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ABSTRACT

This document contains validated activities and competencies needed by librarians working in a school library. The activities and competencies are organized according to the functions which school librarians perform: acquisitions; cataloging; circulation and reader services; collection maintenance; interlibrary loan; management; reference; and serials control. Within each function, competencies are grouped under the categories of Knowledge, Skills, and Attitudes, and three professional levels are dealt with: entry level (0-3 years experience), mid-level (4-9 years experience), and senior level (10 or more years experience). (THC)

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NEW DIRECTIONS IN LIBRARY AND INFORMATION SCIENCE EDUCATION
FINAL REPORT
VOLUME 2.3
SCHOOL LIBRARIAN COMPETENCIES

1984

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INTRODUCTION

This document contains validated activities and competencies needed by librarians working in a school library. The following operational definition of competency was developed:

> **A competency is a generic knowledge, skill or attitude of a person that is causally related to effective behavior as demonstrated through external performance criteria, where:**
>
> - **Knowledge is having information about, knowing, understanding, being acquainted with, being aware of, having experience of, or being familiar with something, someone, or how to do something.**
> - **Skill is the ability to use one's knowledge effectively.**
> - **Attitude is a mental or emotional approach to something, or someone.**

We have identified several types of knowledge that are necessary to perform information work satisfactorily as follows:

- Basic knowledge in such areas as language, communication, arithmetic operations, etc.
- Subject knowledge of primary subject fields of users served such as medicine, chemistry, law, etc.
- Library and information work environments such as the information community, its participants and their social, economic and technical interrelationships, etc.
- Knowledge of what work is done such as the activities required to provide services and produce products, etc.
- Knowledge of the organization or user community served such as the mission, goals, and objectives of the user or the organization, user's information needs and requirements, etc.

There appear to be three kinds of skills necessary to perform information work satisfactorily including:

- Basic skills such as cognitive, communication, analytical, etc.
- Skills related to each specific activity being performed such as negotiation of reference questions, evaluation of search outputs, etc.
- Other skills such as managing time effectively, budgeting and making projections, etc.

Attitudes of librarians are found to be extremely important to work performance. We have found it useful to subdivide attitudes into:

- Dispositional attitudes toward one's profession, the organization served, one's work organization, and other people such as users and co-workers.
- Personality traits/qualities such as confidence, inquisitiveness, sense of ethics, flexibility, etc.
- Attitudes related to job/work/organization such as willingness to accept responsibility, willingness to learn, desire to grow, etc.

The activities and competencies are organized according to the functions which librarians perform, and by professional level as displayed in Figure 1. The competencies are cumulative across professional level, i.e., competencies of mid-level professionals include entries shown at the mid-level as well as those at the entry level, etc.

It is important to understand the distinction between functions performed and positions or job titles. Our rationale behind the functional approach was that we were more concerned with what information professionals do than with what they are called. In a single-person library, therefore, the librarian will undoubtedly perform more than a single function. In using and interpreting the competency data in this document, it is important to consider the functions being performed by

FUNCTIONS	ACTIVITIES		KNOWLEDGE		SKILLS		ATTITUDES	
	Essential Versus Desirable	More versus Less Important in Future	Essential Versus Desirable	More versus Less Important in Future	Essential Versus Desirable	More versus Less Important in Future	Essential Versus Desirable	More versus Less Important in Future
	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL	ENTRY LEVEL
	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL	MID LEVEL
	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL	SENIOR LEVEL

Figure 1 Organization of Activities and Competencies

professionals and the activities being performed to determine which competencies are appropriate. The functions identified for librarians working in school libraries are:

- acquisitions
- cataloging
- circulation and reader services
- collection maintenance
- interlibrary loan
- management
- reference
- serials control.

Three professional levels were defined as follows:

- entry level (up to 3 years of professional experience)
- mid level (4-9 years of professional experience)
- senior level (10 or more years of professional experience).

The activities performed are listed first and numbered sequentially. The actual assignment of individual activities to subcategories of the major activities and to the functions varies from library to library. The organization of activities that we developed provided us with the "best fit" case. Indented and unnumbered activities are essentially paraprofessional activities which, in small libraries, may be performed by professionals.

The activities are followed by the validated sets of knowledge, skills and attitudes. Two versions of each of the lists are provided. The first set have those competencies designated by the validators as essential in bold face print, and those designated as desirable in regular face print. The level of emphasis is denoted by asterisks as follows:

* denotes each competency rated as essential or desirable by 50-70 percent of the validators of that competency

** denotes each competency rated as essential or desirable by 71-84 percent of that validators of that competency

*** denotes each competency rated as essential or desirable by 85-100 percent of the validators of that competency.

The second set of knowledge, skills, and attitudes have competencies designated by the validators as becoming more or less important in the future. Again, the level of emphasis is denoted by asterisks as follows:

* denotes each competency rated by 1-20 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

** denotes each competency rated by 21-40 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

*** denotes each competency rated by 41-100 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

● denotes competencies rated as currently not applicable which have also been rated as becoming more important in the future.

SCHOOL LIBRARIAN COMPETENCIES

ACQUISITIONS

ACTIVITIES

ACQUISITIONS **ENTRY LEVEL**

Selection

1. Develop a good understanding of the media center's collection development policies and guidelines
2. Receive requests from faculty and media center staff for purchase of materials for the library's collections or for the professional collection
3. Forward orders for serials/numbered series to the serials control section
4. Select materials to order from publishers' catalogs, book reviews, bibliographies, circulation and interlibrary loan requests for materials not owned by the library, exchange lists, etc.
5. Supervise the preparation of lists of selected citations which may be reviewed by the appropriate faculty advisory group for purchase approval
6. Forward bibliographic citations for selected serials/numbered series and any such materials received in the section to the serials control section for processing
7. Examine shipments of unsolicited materials (blanket orders/on-approval shipments, gifts, etc.) to select which items are suitable for retention; annotate processing slips for each item as required
8. Assign processing priorities to all material selected for the collections
9. Maintain a statistical record of selection and the usefulness of various selection tools
10. Supervise bibliographic searching and verification:

    search in-process file(s) (items on order, want lists, and received items not yet cataloged) and library's catalog(s) to determine if the cited titles are needed for the collections
    annotate citations that are discovered to be serials/numbered series and return them to supervisor
    verify and locate additional bibliographic data, as required; refer problems to supervisor
    maintain record of searching and verification statistics

Selection (cont'd)

11. Search for trade and non-trade bibliographic information that technicians are unable to locate; refer problems to higher level staff, as appropriate

12. Determine source of procurement (jobber, direct, gift, exchange, etc.)

13. Prioritize recommended selections in each subject area; consult with mid level librarian to determine which materials should be placed on the want list for possible order action at a later date

14. Supervise order/request processing:

    prepare records (manual or automated) for items to be ordered/ requested now/later
    prepare purchase orders, if required
    prepare order/request documentation for mailing
    claim outstanding orders
    cancel orders, as required
    re-issue orders to different sources, as required
    maintain statistical record of order/request processing operations

Receipt Processing

15. Supervise receipt processing of ordered/requested materials, blanket order/on-approval shipments, leased materials, unsolicited gifts, etc.

    open packages and retain sender information
    check shipments against packing lists/invoices
    check shipments for damage
    examine received items for imperfections
    for unsolicited shipments, search in-process file(s) and center's catalog(s) to determine which items are needed for the collections
    update in-process file with receipt information
    update in-process file re: any errors in receipt or receipt of damaged/imperfect materials
    annotate packing slips/invoices for damaged/imperfect materials, incorrectly supplied materials, and unwanted materials
    annotate packing slips/invoices to indicate materials which are branch copies
    annotate packing slips/invoices to certify receipt of all materials retained
    deliver packing slips/invoices to invoice processor
    insert and/or update processing slips for materials to be retained

ACTIVITIES

ACQUISITIONS ENTRY LEVEL

Receipt Processing (cont'd)

15. Supervise receipt processing of ordered/requested materials, blanket order/on-approval shipments, leased materials, unsolicited gifts, etc. (cont'd)

    mark materials retained for the collection as required (invoice number, date of receipt, etc.)
    place materials to be cataloged on the appropriate book trucks
    forward any serials/numbered series received to the serials control section
    process materials for the professional collections as required and place on the appropriate book trucks
    send form letters to acknowledge gifts, if appropriate
    prepare damaged/imperfect materials, incorrectly supplied materials, and unwanted materials for return to suppliers, if appropriate
    place unwanted/damaged items not to be returned to suppliers in specified area to await proper disposal
    maintain statistical record of receipt processing operations

16. Supervise the delivery of materials to the cataloging section at regular intervals

17. Supervise preparation and disposal of unwanted materials

File Maintenance

18. Supervise creation and maintenance of in-process file(s)

    input orders/requests, want list items, unsolicited receipts
    update records based on correspondence received and actions taken
    update records with receipt, return and disposal information
    update records with cataloger assignment, if appropriate
    update records when cataloging has been completed and items are no longer in process
    delete records at appropriate intervals, maintain statistical records of file creation and maintenance operations

19. Supervise maintenance of accession records for materials which will not be added to the collections, if required

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ACQUISITIONS ENTRY LEVEL

Other

20. Handle problems related to the selection and acquisition of materials for media centers; refer special problems to higher level staff, as appropriate
21. Assist staff in locating materials received but still in process
22. Advise other libraries/media centers of sources used to obtain difficult-to-locate materials
23. Supervise the preparation of exchange lists for items selected by senior staff
24. Examine dealers' stocks and publishers'/producers' displays at book/AV fairs and conferences in order to become familiar with the characteristics of the various offerings
25. Conduct business by phone, when appropriate
26. Write memos and letters, as required
27. Prepare manuals of procedures
28. Make recommendations to the section manager for improvement in operations of the unit/section
29. Attend and participate in staff meetings
30. Provide an overview of the operations of the unit/section to visitors, as requested
31. Supervise technicians, and paraprofessional staff
32. Work to develop "esprit de corps" among staff supervised
33. Assist section manager in writing job descriptions for self and for staff supervised
34. Assist section manager in developing performance standards for self and for staff supervised
35. Assist section manager in the review and performance evaluation of staff supervised
36. Assist in the selection of new technicians and paraprofessionals

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ACQUISITIONS ENTRY LEVEL

Other (cont'd)

37. Keep abreast of developments in the information field, library practice or legislation that affect selection and acquisition of materials

38. Attend professional meetings and prepare reports for dissemination to staff

39. Develop professional contacts both within and outside the media center system

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ACQUISITIONS MID LEVEL

Selection

40. Keep abreast of the information needs of the user community so that selection of materials may be made to support new courses and other new areas of educational interest/activity

41. Select materials which are to be placed on the want list based on budget constraints

Verification and Ordering

42. Supervise the maintenance of an address file of procurement sources

43. Draft form letters for ordering/requesting materials, claiming/canceling orders, acknowledging gifts, etc.

44. Schedule purchases of materials in order to operate within the budget

45. Work with contract and/or purchasing department(s) of the school system to identify requirements and develop draft procedures for purchasing materials

46. Work with serials control staff to develop draft procedures for ordering and fiscal control of serials/numbered series

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Fiscal Control

47. Work with the finance and accounting department of the school system to identify requirements and develop draft procedures for processing invoices for payment

48. Supervise invoice processing for acquisition of materials

    receive and log in packing slips/invoices from acquisitions and serials control staff with receipt information noted
    receive and log in original invoices
    match original invoices with annotated packing slips/invoice copies
    convert currency to U.S. dollars, if required
    search/request search of acquisition and serials control files to verify receipt, if necessary
    maintain record of expenditures by account
    process approved invoices for payment and forward them to the appropriate fiscal office
    process purchase order documents as required
    receive correspondence from suppliers
    draft replies to correspondence concerning payment problems
    prepare prepayment statements if required
    maintain files of invoices and other documents related to the purchase of library materials
    prepare reports of expenditures and balances in all accounts
    maintain a record of invoice processing statistics

49. Maintain control of the materials budget; notify the section manager of situations which may require special action

50. Review reports of expenditures and balances in all accounts as prepared by an accounting technician; draft narrative statements to accompany the reports, if required

51. Approve/modify draft replies to correspondence concerning payment problems

52. Work with the finance and accounting department of the school system to establish deposit accounts with certain suppliers

53. Determine the average cost of each type of material purchased

54. Project budget requirements for purchasing materials for the new fiscal year

ACTIVITIES

ACQUISITIONS MID LEVEL

Fiscal Control (cont'd)

55. Assess performance of existing equipment/systems used in acquisitions and investigate capabilities of other equipment/systems

56. Recommend acquisition of new/additional equipment/systems

57. Train staff in operation and in-house maintenance of equipment/systems

58. Supervise in-house operation and maintenance of equipment/systems

59. Gather information for maintenance contracts on equipment/systems

60. Draft statements of work for contact proposals for services, systems, equipment and/or maintenance

61. Evaluate contractors' proposals

62. Train and supervise entry level staff and accounting technician(s)

63. Assist in the selection of new professional staff and accounting technician(s)

64. Write articles for professional journals/newsletters when appropriate

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ACQUISITIONS SENIOR LEVEL

Selection

65. Select and maintain an up-to-date collection of selection tools and aids to bibliographic verification

66. Work with reference, reader services and interlibrary loan section staff members to analyze library resources in the area and make recommendations concerning the degree to which duplication of collections should occur. Identify subject areas in which resource sharing may be mutually beneficial

67. Work with reference and reader services staff and faculty advisory groups to identify user needs and activities and charges occurring in the user population which will influence selection of library materials

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ACQUISITIONS SENIOR LEVEL

Selection (cont'd)

68. Formulate draft selection and retention policies for all types of materials

69. Prepare draft selection guidelines to be used by staff and faculty advisory groups as an aid to interpreting selection policies

70. Periodically review staff selections to ensure more uniform interpretation of the selection policies; conduct training sessions as required

71. Participate in meetings of faculty advisory groups which review lists of materials selected for purchase

72. Evaluate the existing collections and identify areas of weakness

73. Prepare lists of materials to be purchased in order to upgrade areas of weakness in the collections

74. Together with reference and reader services staff, compile lists of reference books and standard works that comprise a basic collection in each major subject area. New editions of these materials are purchased automatically

75. Together with reference and reader services staff and faculty advisory groups, select materials for branch collections

76. Develop guidelines for identifying materials in the collections which should be retained in microform for preservation

77. Review damaged materials identified by collection maintenance staff; determine which materials should be replaced, discarded, rebound, or replaced by a new edition or more recent work on the same subject

78. Select items which have been weeded or set aside for disposal which may be offered to exchange partners, if appropriate

79. Identify existing collections of special value to the media centers which are advertised for sale or which may be solicited as gifts

ACTIVITIES

ACQUISITIONS **SENIOR LEVEL**

Other

80. Function as a technical expert in all matters of selection and acquisition of materials for media centers

81. Work with senior reader services, cataloging and serials control staff members to identify proccessing priorities and draft guidelines for priority assignment to all incoming materials

82. Interview salesmen and publishers' and dealers' representatives to learn about forthcoming publications, revisions of standard reference works, services offered, etc.

83. Assist the section manager in negotiating with publishers' and dealers' representatives to set up on approval programs, leasing programs and other services

84. Prepare an evaluation of each dealer's performance for review by the section manager

85. Identify sources for obtaining out of print materials which are to be replaced/added to the collections

86. Draft a gift acceptance policy statement

87. Identify potential exchange partners

88. Draft an exchange policy statement

89. Draft documentation to establish an exchange program

90. Supervise the exchange program

91. Identify sources for disposal of unwanted materials

92. Draft documentation to set up disposal program

93. Draft all selection and acquisition procedures and policies; draft revisions as required

94. Flowchart and document selection and acquisition procedures

95. Assist section manager in on-going systems analysis of the section

96. Analyze statistics for all operations in the section and prepare draft statistical reports

Other (cont'd)

97. Train and supervise mid level staff

98. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

KNOWLEDGE

ACQUISITIONS

ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g., literature, music, etc.)
** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

* knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
** knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
* knowledge of available and emerging information technologies and their applications
** knowledge of completed and ongoing research in the field and its applicability to practice
** knowledge of career opportunities
** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
* knowledge of the variety of work settings and their organizational structures
* knowledge of the functions performed within the various work settings and the services and products offered
** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

** knowledge of the acquisitions function, the range of services and products offered (both actual and potential)
* knowledge of the activities that are required to offer the services and produce the products
* knowledge of the various resources that are necessary to support the activities
*** knowledge of acquisition tools and sources of bibliographic information
** knowledge of acquisition methods and techniques
* knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

ACQUISITIONS — ENTRY LEVEL

Knowledge of how to do work

- *** knowledge of how to perform the various activities
- *** knowledge of how to use the acquisitions tools and sources of bibliographic information
- *** knowledge of how to apply the acquisitions methods and techniques
- * knowledge of personnel procedures

Knowledge of the institution served and its library

- ** knowledge of the mission, goals and objectives of the institution served
- ** knowledge of the structure of the institution and the role of the library within the institution
- ** knowledge of the various programs offered and key personnel within the institution
- *** knowledge of the policies and procedures relevant to the library
- *** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- *** knowledge of the users' information needs and requirements
- *** knowledge of the collection, and of related collections

---

ACQUISITIONS — MID LEVEL

- ** greater depths of knowledge specified above
- ** knowledge of the operations of other sections in the library and how they relate to acquistions
- ** knowledge of available vendor-supplied systems, services and products to support acquisitions
- * knowledge of the contracting process, both in general and within the organization
- * knowledge of evaluation methods and techniques to evaluate systems, services and products

ACQUISITIONS SENIOR LEVEL

* greater depths of knowledge specified above
** knowledge of public relations techniques
** knowledge of statistical description, analysis, interpretation and presentation
** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
* knowledge of cost analysis and interpretation methods
* knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the library
** state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

KNOWLEDGE

ACQUISITIONS ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g., literature, music, etc.)
*** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

*** knowledge of definition, structure, and formats of information
*** knowledge of alternative approaches to the organization of information
*** knowledge of alternative approaches to retrieval of information
*** knowledge of alternative approaches to information management
*** knowledge of available and emerging information technologies and their applications
*** knowledge of completed and ongoing research in the field and its applicability to practice
*** knowledge of career opportunities
** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

*** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
*** knowledge of the variety of work settings and their organizational structures
*** knowledge of the functions performed within the various work settings and the services and products offered
*** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

** knowledge of the acquisitions function, the range of services and products offered (both actual and potential)
** knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
* knowledge of acquisition tools and sources of bibliographic information
* knowledge of acquisition methods and techniques
** knowledge of performance expected and how it can be measured
** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

ACQUISITIONS — **ENTRY LEVEL**

Knowledge of how to do work

** knowledge of how to perform the various activities
* knowledge of how to use the acquisitions tools and sources of bibliographic information
* knowledge of how to apply the acquisitions methods and techniques
** knowledge of personnel procedures

Knowledge of the institution served and its library

*** knowledge of the mission, goals and objectives of the institution served
** knowledge of the structure of the institution and the role of the library within the institution
** knowledge of the various programs offered and key personnel within the institution
** knowledge of the policies and procedures relevant to the library
** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
*** knowledge of the users' information needs and requirements
*** knowledge of the collection, and of related collections

ACQUISITIONS — **MID LEVEL**

** greater depths of knowledge specified above
** knowledge of the operations of other sections in the library and how they relate to acquistions
* knowledge of available vendor-supplied systems, services and products to support acquisitions
* knowledge of the contracting process, both in general and within the organization
*** knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

ACQUISITIONS SENIOR LEVEL

** greater depths of knowledge specified above
*** knowledge of public relations techniques
*** knowledge of statistical description, analysis, interpretation and presentation
** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
*** knowledge of cost analysis and interpretation methods
** knowledge of methods of resource allocation
** knowledge of standards, measures and methods for evaluating personnel
*** knowledge of alternative management structures and their implications for the operation of the library
** state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

SKILLS

ACQUISITIONS ENTRY LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

* perform each activity
*** establish rapport with users and colleagues
* communicate well by written, verbal and non-verbal means
conduct an interview
* conduct meetings with individuals and groups
* collect, analyze and interpret data
* make decisions and recommendations based on available information
* supervise staff
** work independently and in groups
* develop criteria for evaluation

Ability to:

** make effective, timely, and well-informed decisions
** isolate and define problems and develop the necessary criteria and action for their solution
*** manage time effectively

ACQUISITIONS MID LEVEL

Skills Related to Each Specific Activity

* Skills listed above are developed to a greater extent

Ability to:

** perceive the needs of the organization and not just the library
** anticipate long-range needs of library
** design systems and procedures to improve library operations
arbitrate and negotiate

ACQUISITIONS SENIOR LEVEL

***** Skills listed above are developed to a greater extent**

Ability to:

** apply methods of measurement and evaluation
*** budget and make projections
*** optimize the use of library resources

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

SKILLS

ACQUISITIONS — ENTRY LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

** perform each activity
*** establish rapport with users and colleagues
** communicate well by written, verbal and non-verbal means
* conduct an interview
** conduct meetings with individuals and groups
*** collect, analyze and interpret data
*** make decisions and recommendations based on available information
** supervise staff
** work independently and in groups
*** develop criteria for evaluation

Ability to:

*** make effective, timely, and well-informed decisions
*** isolate and define problems and develop the necessary criteria and action for their solution
*** manage time effectively

ACQUISITIONS — MID LEVEL

Skills Related to Each Specific Activity

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Ability to:

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SKILLS

ACQUISITIONS | SENIOR LEVEL

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Ability to:

*** apply methods of measurement and evaluation
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COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

ATTITUDES

ACQUISITIONS

Dispositional Attitudes

Attitudes Toward Institutions

* Respect for profession
** Respect for the library
** Respect for the parent organization

Attitudes Toward Other People

Toward Users

*** Respect users
* Like people in general
** Like children
*** Like to help people
* Like to meet people
* Like to make others feel comfortable
*** Sensitive to others' needs

Toward Others in the Workplace

*** Respect co-workers
** Like to work with others/as a team
Like to work on own
* Willingness to draw upon and share knowledge and experience with others
** Supportive of co-workers
* Enjoy managing/supervising others

Personal Qualities

* Alertness
* Assertiveness
* Compassion/Kindness
** Confidence
Cheerfulness
*** Dependability
* Determination/Tenacity
* Diplomacy
* Emotional stability
* Fairness
** Flexibility/Versatility
* Imagination
* Inquisitiveness

ATTITUDES

ACQUISITIONS

Personal Qualities (cont'd)

* Leadership ability
** Neatness
* Need for achievement
** Objectivity
** Open-mindedness
* Optimism/Positive attitude
** Organization
* Patience
* Physical endurance
** Resourceful
Sensitive/Thoughtful
* Sense of humor
* Sense of ethics
* Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

*** Willingness to take/accept responsibility
** Willingness to take initiative
* Willingness to respond to authority, apply and follow policy
*** Desire to learn/try
* Willingness to fail
** Willingness to ask questions
** Desire to work to best of ability
* Responsiveness to time constraints
** Accuracy
Willingness to get hands dirty
* Attention to detail
* Willingness to do clerical tasks
*** Desire to follow-through
** Service orientation
* Organizational identity
* Willingness to promote library and its services
** View of library as part of a larger information environment
* View of library as an organization
* Ability to see broad picture
** Ability to sacrifice short-term gains for long-term goals
* Political sense
* Curiosity
* Variety of interests
* Desire to grow personally
* Desire to grow professionally
* Desire to remain current in specific and general subject field
*** Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

ACQUISITIONS

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* Desire to remain current in specific and general subject field
** Positive attitude toward job

SCHOOL LIBRARIAN COMPETENCIES

CATALOGING

ACTIVITIES

CATALOGING | **ENTRY LEVEL**

---

1. Supervise and perform, as required, pre-cataloging searching
2. Perform descriptive cataloging (with or without copy) for materials which will require original cataloging
3. Determine main and added entries
4. Assign subject headings from the approved list(s) of headings
5. Classify materials using the approved classification system(s)
6. Establish cataloging authority data
7. Establish cross reference data
8. Code cataloging and authority data for data entry as part of the cataloging process, or prepare the main entry catalog card
9. Recatalog and reclassify materials already in the collection, as required
10. Consult reference books and/or online files, and/or make phone calls to obtain information necessary for cataloging
11. Refer cataloging problems to higher level staff
12. Keep abreast of changes relating to cataloging procedures (e.g., in-house memos, LC rule interpretations of AACR 2, new subject terms, updated instructions for searching/updating online files, etc.)
13. Maintain a record of pre-cataloging searching statistics
14. Maintain a record of cataloging statistics

Other

15. Write memos and letters as required
16. Prepare manuals of procedures for pre-cataloging searching
17. Select/develop a processing form to be use in pre-cataloging searching
18. Make recommendations to the section manager for improvement in operations of the unit/section and for improvement in bibliographic access to the collection(s)

CATALOGING ENTRY LEVEL

Other (cont'd)

19. Attend and participate in staff meetings

20. Provide an overview of the operations of the unit/section to visitors, as requested

21. Train and supervise pre-cataloging searchers

22. Work to develop "esprit de corps" among staff supervised

23. Assist section manager in writing job descriptions for self and staff supervised

24. Assist section manager in developing performance standards for self and for staff supervised

25. Assist section manager in the review and performance evaluation of staff supervised

26. Assist in the selection of new technicians

27. Keep abreast of developments in the information field or library practice that affect cataloging, classification, and bibliographic files and networks

28. Attend professional meetings and prepare reports for dissemination to staff

29. Develop professional contacts both within and outside the library

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CATALOGING MID LEVEL

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30. Perform cataloging and classification of difficult materials

31. Supervise limited cataloging of certain types of library materials (e.g., fiction, biographies) and titles for which network supplied cataloging will be accepted

32. Supervise Cuttering, as required

33. Handle cataloging problems encountered by entry level staff; refer to higher level staff, if necessary

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CATALOGING MID LEVEL

---

34. Maintain a statistical record of cataloging difficult items

35. Maintain a record of limited cataloging statistics

36. Maintain a record of Cuttering statistics

Bibliographic Files

37. Supervise maintenance of accession records, if appropriate

38. Supervise online entry of cataloging data and/or locator data, if appropriate

39. Supervise proofreading of computer printouts of cataloging data, if appropriate

40. Supervise ordering/preparation of card sets, if a card catalog is maintained

41. Supervise processing of card sets received with pre-processed library materials

42. Supervise and revise filing of cards, if required

43. Supervise physical maintenance of the card catalog, if required

    replace catalog cards, guide cards, and drawer labels
    shift cards

44. Supervise updating the bibliographic files (online or manual)

    add/correct locator data
    indicate number of copies owned
    indicate holdings data for multi-volume sets
    indicate withdrawal or loss of materials
    delete/correct incorrect records

45. Supervise distribution of bibliographic records/files to branches

46. Supervise production of lists of new accessions; forward them to the circulation staff for distribution

47. Maintain statistical records of operations relating to the creation and maintenance of bibliographic files

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CATALOGING MID LEVEL

Materials Processing

48. Supervise the physical processing of all items to be added to the library's collection(s):

    mark materials with the library system's identification and branch identification
    affix security labels
    type and apply classification labels
    prepare item cards for circulation, or affix circulation bar code/ OCR lables
    affix date due slips, if required
    open new books
    apply purchased covers
    mount pamphlet-type materials in special binders
    place AV materials in proper storage containers, if required
    segregate materials requiring special treatment or repairs and deliver to collection maintenance section
    place new materials on appropriate book trucks and deliver to designated locations

49. Maintain statistical records of operations relating to the physical processing of materials

Other

50. Prepare manuals of procedures for limited cataloging, Cuttering, creation and maintenance of bibliographic files, and for physical processing of materials

51. Prepare manuals of procedures for handling bibliographic records/files in branches

52. Select/develop processing forms/input forms to be used in all activities supervised

53. Work closely with collection maintenance staff and media center directors during inventories and/or weeding so bibliographic files may be updated as required

54. Assess performance of existing equipment/systems used in cataloging and investigate capabilities of other equipment/systems

55. Recommend acquisition of new/additional equipment/systems

56. Train staff in operation and in-house maintenance of equipment/systems

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CATALOGING MID LEVEL

Other (cont'd)

57. Supervise in-house operation and maintenance of equipment/systems

58. Gather information for maintenance contracts on equipment/systems

59. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance

60. Evaluate contractors' proposals

61. Assess quality of supplies used in physical processing of materials

62. Work with circulation and collection maintenance staff members to recommend changes in supplies/methods for physical processing of library materials when current processing is inadequate

63. Train and supervise entry level catalogers

64. Train and supervise technicians, paraprofessionals, and volunteers; train appropriate staff in branches to handle bibliographic records/ files as required

65. Assist in the selection of new professional staff

66. Write articles for professional journals/newsletters when appropriate

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CATALOGING SENIOR LEVEL

Cataloging

67. Function as a technical expert in the cataloging section

68. Determine level of cataloging (full or limited) for all materials received for cataloging

69. Assign materials to each cataloger

70. Supervise recordkeeping indicating location in section of each item to be cataloged

71. Revise all cataloging performed in section and/or under contract to ensure consistency of interpretation of system's cataloging policies and standards

Cataloging (cont'd)

72. Maintain a statistical record for each cataloger indicating quantity and quality of cataloging produced

73. Maintain a summary record of revision statistics

Other

74. Maintain an up-to-date collection of reference works necessary to support cataloging and creation of authority records

75. Prepare cataloging manuals and other aids to improve the quality of cataloging produced by the section or by contractors

76. Select/develop cataloging input forms

77. Draft cataloging procedures and policies; draft revisions as required

78. Draft guidelines for determining level of cataloging to be given to various categories of materials

79. Keep abreast of developments in network, national, and international standards for bibliographic description

80. Together with the section manager, represent the media center system at bibliographic network/consortia meetings

81. Keep abreast of the educational information needs of the community so that proper assignment of subject headings and classification numbers may provide users with ready access to topics of special importance

82. Recommend expansion of the classification system(s) as required

83. Recommend expansion of the standard list of subject headings, as required

84. Work with serials control and interlibrary loan staff members to produce and/or update the serials holdings list

85. Make inquiries and recommendations concerning the advertisement, publication, and distribution of book/microform catalogs, lists of new titles cataloged, etc.

86. Recommend participation in bibliographic network(s)/projects

Other (cont'd)

87. Supervise the procedures and quality of data for input to union catalogs and bibliographic networks/projects

88. Flowchart and document all cataloging section procedures

89. Assist section manager in on-going systems analysis of the section

90. Analyze cataloging section statistics and prepare draft statistical reports

91. Train and supervise mid level staff

92. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

KNOWLEDGE

CATALOGING ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g., literature, music, etc.)
** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

** knowledge of definition, structure, and formats of information
** knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
* knowledge of available and emerging information technologies and their applications
* knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
* knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
* knowledge of the variety of work settings and their organizational structures
* knowledge of the functions performed within the various work settings and the services and products offered
* knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

*** knowledge of the cataloging function, the range of services and products offered (both actual and potential)
* knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
*** knowledge of cataloging tools and sources of bibliographic information
*** knowledge of cataloging methods and techniques
* knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

CATALOGING ENTRY LEVEL

Knowledge of how to do work

*** knowledge of how to perform the various activities
*** knowledge of how to use the cataloging tools and sources of bibliographic information
*** knowledge of how to apply the cataloging methods and techniques
* knowledge of personnel procedures

Knowledge of the institution served and its library

** knowledge of the mission, goals and objectives of the institution served
** knowledge of the structure of the institution and the role of the library within the institution
* knowledge of the various programs offered and key personnel within the institution
*** knowledge of the policies and procedures relevant to the library
** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
*** knowledge of the users' information needs and requirements
*** knowledge of the collection, and of related collections

CATALOGING MID LEVEL

** greater depths of knowledge specified above
* knowledge of the operations of other sections in the library and how they relate to cataloging
*** knowledge of available vendor-supplied systems, services and products to support cataloging
knowledge of the contracting process, both in general and within the organization
* knowledge of evaluation methods and techniques to evaluate systems, services and products

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CATALOGING SENIOR LEVEL

---

* greater depths of knowledge specified above
* knowledge of public relations techniques

knowledge of statistical description, analysis, interpretation and presentation

*** knowledge of the costs associated with library resources (materials, personnel, space, etc.)

* knowledge of cost analysis and interpretation methods

** knowledge of methods of resource allocation

* knowledge of standards, measures and methods for evaluating personnel

knowledge of alternative management structures and their implications for the operation of the library

* state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

KNOWLEDGE

CATALOGING ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

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KNOWLEDGE

CATALOGING

ENTRY LEVEL

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** knowledge of the collection, and of related collections

CATALOGING

MID LEVEL

** greater depths of knowledge specified above
** knowledge of the operations of other sections in the library and how they relate to cataloging
* knowledge of available vendor-supplied systems, services and products to support cataloging
** knowledge of the contracting process, both in general and within the organisation
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*** knowledge of alternative management structures and their implications for the operation of the library
*** state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

SKILLS

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Basic Skills

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Skills Related to Specific Activities

Ability to:

*** perform each activity
 * establish rapport with users and colleagues
*** communicate well by written, verbal and non-verbal means
 * conduct an interview
 * conduct meetings with individuals and groups
 ** collect, analyze and interpret data
 ** make decisions and recommendations based on available information
 * supervise staff
 ** work independently and in groups
 develop criteria for evaluation

Ability to:

*** make effective, timely, and well-informed decisions
 ** isolate and define problems and develop the necessary criteria and action for their solution
*** manage time effectively

CATALOGING MID LEVEL

Skills Related to Each Specific Activity

*** Skills listed above are developed to a greater extent

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ATTITUDES

CATALOGING

Dispositional Attitudes

Attitudes Toward Institutions

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Attitudes Toward Other People

Toward Users

*** Respect users
* Like people in general
** Like children
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Toward Others in the Workplace

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Personal Qualities

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* Assertiveness
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** Confidence
* Cheerfulness
*** Dependability
** Determination/Tenacity
* Diplomacy
* Emotional stability
* Fairness
* Flexibility/Versatility
* Imagination
* Inquisitiveness
* Leadership ability

ATTITUDES

CATALOGING

Personal Qualities (cont'd)

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*** Organization
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ATTITUDES

CATALOGING

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- * Desire to grow professionally
- * Desire to remain current in specific and general subject field
- * Positive attitude toward job

SCHOOL LIBRARIAN COMPETENCIES

CIRCULATION AND READER SERVICES

ACTIVITIES

CIRCULATION AND READER SERVICES **ENTRY LEVEL**

---

1. Supervise daily operation of the circulation desk:

    receive requests for materials
    fulfill requests for materials
    issue, renew, receive materials
    examine returned materials for damage, proper markings, etc.
    discharge materials
    maintain circulation files for regular and long term loan periods
    reserve books for individual users
    follow-up overdues
    collect overdue fines
    collect funds for lost materials
    maintain record of funds collected and charges assessed
    register users
    maintain registration file
    provide users with information on circulation policies and procedures
    place returned materials on appropriate book trucks
    forward damaged materials to the collection maintenance section
    maintain record of circulation and user statistics
    maintain temporary files of requests for materials owned but not found in the collection
    maintain temporary files of requests for materials not owned by the library

2. Attempt to locate requested materials that technicians/users report as "not found on shelf"

3. Refer users to interlibrary loan staff or to public library to obtain materials that are needed

4. Perform circulation procedures when necessary

5. Supervise and schedule shelving/storage of circulated materials in the collections

6. Read/review new materials and prepare short synopses, as required

7. Compile reading/viewing lists on specific subjects and/or for special groups of users

8. Recommend acquisition of new materials for the collections

9. Assist users in selecting materials

10. Assist users in locating materials in the catalog and in the collection(s)

ACTIVITIES

CIRCULATION AND READER SERVICES ENTRY LEVEL

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11. Monitor use of valuable materials
12. Assist users in the operation of A-V and other equipment (microcomputers for computer-aided instruction, video cameras, etc.)
13. Schedule facilities for users to preview/view films and other A-V software
14. Supervise the distribution of new accessions lists
15. Set up and maintain display of new books in the reading room
16. Supervise shelving of the current journal issues in the reading room
17. Supervise orderly maintenance of the reading room (clearing tables, re-shelving newspapers, etc.)
18. Schedule use of meeting rooms, study rooms, typing rooms, etc.
19. Handle user complaints; refer to higher level staff if appropriate
20. Keep informed of current copyright legislation and its impact on media centers and users
21. Conduct media center business by phone, when appropriate
22. Write memos and letters, as required
23. Prepare manuals of procedures
24. Make recommendations to the media center director for improvement in operations of the activity and for improvement in services to users
25. Attend and participate in staff meetings
26. Provide an overview of the operations of the media center to visitors, as requested
27. Train and supervise technicians, paraprofessional staff, student helpers and adult volunteers
28. Work to develop "esprit de corps" among staff supervised
29. Assist media center director in writing job descriptions for self and for staff supervised

ACTIVITIES

CIRCULATION AND READER SERVICES

ENTRY LEVEL

30. Assist media center director in developing performance standards for self and for staff supervised
31. Assist media center director in the review and performance evaluation of staff supervised
32. Keep abreast of developments in the information field, library/media center practice, or legislation that affect circulation and use of library materials
33. Attend professional meetings and prepare reports for dissemination to staff
34. Develop professional contacts both within and outside the media center

CIRCULATION AND READER SERVICES

MID LEVEL

35. Supervise the daily circulation of reserve materials
36. Receive and supervise processing of faculty requests for placing materials on reserve
37. Notify central acquisitions when multiple copies of reserve materials are needed
38. Review requests for "not found" and "not owned" materials and forward requests for selected items to the central acquisitions section
39. Notify acquisitions section of materials which have been lost by users and require replacement
40. Ensure proper posting of copyright legislation notice on all copying machines
41. Plan and conduct orientation and education sessions for groups of users (e.g., term paper workshop; film production techniques; microcomputer training, etc.)
42. Plan and conduct other group activities for users (media club meetings film showings, book review groups, in-service training for teachers and administrators, workshops, etc.)
43. Devise tools and displays which will ease access to collections and motivate use

ACTIVITIES

CIRCULATION AND READER SERVICES MID LEVEL

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44. Cooperate with faculty and student groups to plan displays, prepare special reading lists, develop print and non-print materials to support the curriculum, etc.

45. Make preliminary selection of forms and/or develop draft record formats for all circulation files and operations

46. Work with interlibrary loan staff and collection maintenance staff to develop procedures and resolve problems related to use of the circulation files/system for interlibrary loan purposes, for control of materials sent to the bindery, and for use in identifying materials for possible weeding

47. Work with the collection maintenance staff to develop procedures and resolve problems related to the daily operation and maintenance of the center's security system by circulation staff

48. Work with collection maintenance and cataloging staff members to recommend changes in supplies/methods for physical processing of media center materials when current processing is inadequate

49. Assess performance of existing equipment/systems used in circulation and investigate capabilities of other equipment/systems

50. Recommend acquisition of new/additional equipment/systems

51. Train staff and student helpers/volunteers in operation and in-house maintenance of equipment/systems

52. Supervise in-house operation and maintenance of equipment/systems (including AV hardware)

53. Gather information for maintenance contracts on equipment/systems

54. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance

55. Evaluate contractors' proposals

56. Train and supervise entry level staff

57. Assist in the selection of new professional staff

58. Write articles for professional journals/newsletters when appropriate

ACTIVITIES

CIRCULATION AND READER SERVICES | SENIOR LEVEL

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59. Function as a technical expert in all activities related to circulation and reader services

60. Draft procedures to expedite return of circulated materials to the collections

61. Develop draft standards for providing service to faculty, students, and student groups

62. Develop and conduct surveys to identify characteristics of the user population

63. Analyze library/media resources in the area (including public library programs), user needs and activities, and changes occurring in the user population which will influence library service needs and selection of library materials

64. Review cataloging records for materials which are missing following inventory; select items which should be replaced. Confer with reference staff, as required

65. Review items in the collections which have not circulated within a specified time period; select items which should be weeded

66. Work with selection, reference, and collection maintenance staff to identify materials which should be retained in microform for preservation

67. Work with selection, reference, and collection maintenance staff to identify valuable materials in the collection which require special treatment

68. Make inquiries and recommendations concerning the advertisement, publication, and distribution of print and non-print materials prepared by section staff

69. Draft circulation procedures and policies; draft revisions as required

70. Flowchart and document circulation procedures

71. Assist media center director in on-going systems analysis of the section

72. Analyze circulation statistics and prepare draft statistical reports

73. Analyze financial data and prepare draft financial reports

74. Supervise mid level staff

75. Function as media center director in his/her absence

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

KNOWLEDGE

CIRCULATION AND READER SERVICES ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g., literature, music, etc.)
** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
** knowledge of available and emerging information technologies and their applications
* knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
* knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
** knowledge of the variety of work settings and their organizational structures
** knowledge of the functions performed within the various work settings and the services and products offered
* knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

** knowledge of the circulation function, the range of services and products offered (both actual and potential)
* knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
* knowledge of circulation systems
* knowledge of circulation methods and techniques
* knowledge of marketing techniques and public relations
knowledge of performance expected and how it can be measured
knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

CIRCULATION AND READER SERVICES ENTRY LEVEL

Knowledge of how to do work

*** knowledge of how to perform the various activities
*** knowledge of how to use the circulation systems
** knowledge of how to apply the circulation methods and techniques
knowledge of personnel procedures

Knowledge of the institution served and its library

* knowledge of the mission, goals and objectives of the institution served
** knowledge of the structure of the institution and the role of the library within the institution
* knowledge of the various programs offered and key personnel within the institution
*** knowledge of the policies and procedures relevant to the library
*** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
*** knowledge of the users' information needs and requirements
*** knowledge of the collection, and of related collections

CIRCULATION AND READER SERVICES MID LEVEL

* greater depths of knowledge specified above
* knowledge of the operations of other sections in the library and how they relate to circulation and user services
* knowledge of available vendor-supplied systems, services and products to support circulation and user services
* knowledge of the contracting process, both in general and within the organization
* knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

CIRCULATION AND READER SERVICES SENIOR LEVEL

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* greater depths of knowledge specified above
* knowledge of statistical description, analysis, interpretation and presentation
* knowledge of the costs associated with library resources (materials, personnel, space, etc.)
** knowledge of cost analysis and interpretation methods
* knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the library
* state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

KNOWLEDGE

CIRCULATION AND READER SERVICES **ENTRY LEVEL**

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g., literature, music, etc.)
** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

** knowledge of definition, structure, and formats of information
** knowledge of alternative approaches to the organization of information
*** knowledge of alternative approaches to retrieval of information
** knowledge of alternative approaches to information management
*** knowledge of available and emerging information technologies and their applications
** knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
** knowledge of the variety of work settings and their organizational structures
** knowledge of the functions performed within the various work settings and the services and products offered
*** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

** knowledge of the circulation function, the range of services and products offered (both actual and potential)
* knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
* knowledge of circulation systems
* knowledge of circulation methods and techniques
** knowledge of marketing techniques and public relations
** knowledge of performance expected and how it can be measured
** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

CIRCULATION AND READER SERVICES ENTRY LEVEL

Knowledge of how to do work

* knowledge of how to perform the various activities
* knowledge of how to use the circulation systems
* knowledge of how to apply the circulation methods and techniques
** knowledge of personnel procedures

Knowledge of the institution served and its library

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** greater depths of knowledge specified above
* knowledge of the operations of other sections in the library and how they relate to circulation and user services
** knowledge of available vendor-supplied systems, services and products to support circulation and user services
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** knowledge of statistical description, analysis, interpretation and presentation
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** knowledge of cost analysis and interpretation methods
* knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
** knowledge of alternative management structures and their implications for the operation of the library
** state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

SKILLS

CIRCULATION & READER SERVICES

ENTRY LEVEL

Basic Skills

* literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

** perform each activity
** establish rapport with users and colleagues
** communicate well by written, verbal and non-verbal means
conduct an interview
* conduct meetings with individuals and groups
* collect, analyze and interpret data
** make decisions and recommendations based on available information
* supervise staff
* work independently and in groups
* develop criteria for evaluation

Ability to:

** make effective, timely, and well-informed decisions
** isolate and define problems and develop the necessary criteria and action for their solution
*** manage time effectively

CIRCULATION & READER SERVICES

MID LEVEL

Skills Related to Each Specific Activity

*** Skills listed above are developed to a greater extent

Ability to:

** perceive the needs of the community and not just the library
** anticipate long-range needs of library
design systems and procedures to improve library operations
arbitrate and negotiate

CIRCULATION & READER SERVICES SENIOR LEVEL

Skills listed above are developed to a greater extent

Ability to:

* apply methods of measurement and evaluation
*** budget and make projections
*** optimize the use of library resources

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COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

SKILLS

CIRCULATION & READER SERVICES ENTRY LEVEL

Skills Related to Specific Activities

Ability to:

- * perform each activity
- ** establish rapport with users and colleagues
- ** communicate well by written, verbal and non-verbal means
- * conduct an interview
- * conduct meetings with individuals and groups
- ** collect, analyze and interpret data
- ** make decisions and recommendations based on available information
- * supervise staff
- * work independently and in groups
- ** develop criteria for evaluation

Ability to:

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CIRCULATION & READER SERVICES MID LEVEL

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CIRCULATION & READER SERVICES SENIOR LEVEL

Ability to:

- *** apply methods of measurement and evaluation
- *** budget and make projections
- *** optimize the use of library resources

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

ATTITUDES

CIRCULATION AND READER SERVICES

Dispositional Attitudes

Attitudes Toward Institutions

* Respect for profession
*** Respect for the library
*** Respect for the parent organization

Attitudes Toward Other People

Toward Users

*** Respect users
** Like people in general
*** Like children
*** Like to help people
*** Like to meet people
** Like to make others feel comfortable
*** Sensitive to others' needs

Toward Others in the Workplace

*** Respect co-workers
*** Like to work with others/as a team
* Like to work on own
** Willingness to draw upon and share knowledge and experience with others
** Supportive of co-workers
* Enjoy managing/supervising others

Personal Qualities

*** Alertness
* Assertiveness
** Compassion/Kindness
** Confidence
* Cheerfulness
*** Dependability
* Determination/Tenacity
*** Diplomacy
** Emotional stability
** Fairness
*** Flexibility/Versatility
* Imagination
* Inquisitiveness

ATTITUDES

CIRCULATION AND READER SERVICES

Personal Qualities (cont'd)

* Leadership ability
* Neatness
* Need for achievement
* Objectivity
*** Open-mindedness
** Optimism/Positive attitude
*** Organization
* Patience
* Physical endurance
*** Resourceful
* Sensitive/Thoughtful
** Sense of humor
** Sense of ethics
** Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

*** Willingness to take/accept responsibility
* Willingness to take initiative
* Willingness to respond to authority, apply and follow policy
* Desire to learn/try
** Willingness to fail
* Willingness to ask questions
* Desire to work to best of ability
*** Responsiveness to time constraints
** Accuracy
Willingness to get hands dirty
* Attention to detail
* Willingness to do clerical tasks
** Desire to follow-through
*** Service orientation
* Organizational identity
*** Willingness to promote library and its services
* View of library as part of a larger information environment
* View of library as an organization
* Ability to see broad picture
* Ability to sacrifice short-term gains for long-term goals
* Political sense
* Curiosity
* Variety of interests
* Desire to grow personally
* Desire to grow professionally
* Desire to remain current in specific and general subject field
** Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

ATTITUDES

CIRCULATION AND READER SERVICES

Dispositional Attitudes

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CIRCULATION AND READER SERVICES

Personal Qualities (cont'd)

- ** Leadership ability
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- * Optimism/Positive attitude
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- * Sense of humor
- * Sense of ethics

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- * Willingness to ask questions
- * Desire to work to best of ability
- * Responsiveness to time constraints
- * Accuracy
- * Willingness to get hands dirty
- * Attention to detail
- * Willingness to do clerical tasks
- * Desire to follow-through
- * Service orientation
- * Organizational identity
- ** Willingness to promote library and its services
- ** View of library as part of a larger information environment
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- ** Ability to see broad picture
- ** Ability to sacrifice short-term gains for long-term goals
- * Political sense
- * Curiosity
- * Variety of interests
- * Desire to grow personally
- * Desire to grow professionally
- * Desire to remain current in specific and general subject field
- * Positive attitude toward job

SCHOOL LIBRARIAN COMPETENCIES

COLLECTION MAINTENANCE

COLLECTION MAINTENANCE ENTRY LEVEL

Storage Maintenance

1. Supervise orderly maintenance of shelves and storage areas

   place bookends where needed
   place unbound serial issues in boxes/holders
   perform minor shifting of sections of the collection, as needed
   replace shelf labels and location guides as needed

2. Schedule and supervise shelf reading

   re-shelve materials found in the wrong location
   identify items in poor condition

3. Supervise data collection to support planning for shifting the collection

   measure present collection by categories
   measure shelving/storage equipment capacity

4. Supervise preparation of shelves and other storage equipment prior to shifting the collection

   adjust height of shelves
   prepare shelf lables and stack quides

Preservation of Materials

5. Receive materials for repair, cleaning, binding or replacement as identified by circulation staff

6. Receive materials from cataloging which require repair, reinforcement, special containers or binding

7. Supervise in-house treatment of materials

   repair pages
   clean pages
   reinforce bindings
   laminate book jackets and paperbacks
   prepare containers for periodicals, AV materials, pamphlets
   make covers
   clean and repair AV materials

8. Supervise procedures to obtain photocopies of missing pages and have them bound into the proper items

Binding

9. Supervise preparation of materials for binding

   prepare binding specifications for monographs selected for binding
   arrange serial issues in order and tie binding units together
   identify incomplete volumes and notify central serials control section of gaps; send for binding when volume is complete
   prepare binding specifications for each serial title, if not on file with binder
   prepare materials for shipment/pick-up
   update binding records with shipment/pick-up date
   update circulation records for materials sent to bindery
   receive materials from binder
   inspect materials for conformity to requirements
   check shipment against binder's packing slip/invoice
   update binding records with date of return
   update circulation records for materials returned from bindery
   forward invoice to proper office for payment
   maintain file of invoices and other documents related to binding
   maintain a statistical record of binding operations

Inventory and Weeding

10. Supervise inventory-taking

   assign portions of the shelflist to each technician
   identify materials which are missing
   identify materials which lack shelflist cards/catalog records
   identify materials for which the descriptive cataloging does not match the piece in hand
   identify materials which are labeled incorrectly
   forward shelflist records for missing items to reader services for review
   forward records for missing items selected for replacement to the acquisitions section for ordering
   forward materials to cataloging section which require record creation/correction/deletion and/or labeling correction

11. Supervise identification of items for possible weeding

   flag library materials that have not circulated during a specified time period
   notify reader services that selection action is needed
   remove materials that have been selected for weeding and forward to cataloging section for file update

12. Maintain a statistical record of inventory-related operations and weeding operations

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Other

13. Handle problems related to collection maintenance operations; refer problems to higher level staff, as appropriate

14. Conduct library business by phone, when appropriate

15. Write memos and letters, as required

16. Prepare manuals of procedures

17. Make recommendations to the activity manager for improvement in operations of the unit/section

18. Attend and participate in staff meetings

19. Provide an overview of the operations to visitors, as requested

20. Supervise technicians, paraprofessional staff, student workers, and adult volunteers

21. Work to develop "esprit de corps" among staff supervised

22. Assist activity manager in writing job descriptions for self and for staff supervised

23. Assist activity manager in developing performance standards for self and for staff supervised

24. Assist activity manager in the review and performance evaluation of staff supervised

25. Assist in the selection of new technicians and paraprofessionals

26. Keep abreast of developments in the information field and library/media center practice that affect binding, and storage and preservation of media center materials

27. Attend professional meetings and prepare reports for dissemination to staff

28. Develop professional contacts both within and outside the media center

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COLLECTION MAINTENANCE MID LEVEL

Storage Maintenance

29. Work with senior staff to develop procedures for shifting the collection(s)

30. Supervise the shifting of the collection(s)

Preservation of Materials

31. Supervise the proper storage and handling of all types of library materials

32. Supervise the preservation treatment of older materials

33. Identify serials and other materials available on commercially-produced microforms which should be acquired for preservation purposes; request order action by the acquisitions section for selected titles

34. Supervise the microfilming of selected materials for preservation, if required

35. Determine proper treatment of damaged materials

36. Notify acquisitions section of material which needs replacement

37. Gather information on contract repair and preservation treatment of materials

38. Investigate the capabilities of various library security systems and make a recommendation for purchase

39. Train section staff and circulation staff in the operation and maintenance of the library's security system

40. Work with circulation staff to develop procedures and resolve problems related to their daily operation and maintenance of the library's security system

41. Examine library regularly for sources of moisture, fire, vandalism or unauthorized entry

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Binding

42. Gather information on various binding agents: reputation, price, types of binding available, and average length of time materials are inaccessible

43. Prepare draft binding specifications

44. Work with serials records staff to develop procedures for creation of binding records as part of the serial record

45. Prepare draft procedures for in-house binding preparation

46. Work with the proper fiscal office and/or contract office to develop procedures for processing binding invoices

47. Work with the circulation section staff to develop procedures for use of the circulation system to control materials sent to the bindery, to identify heavily used materials, and to identify all materials which circulated during a specified time period

Inventory and Weeding

48. Work with reader services, acquisitions and cataloging section staff members to develop procedures to coordinate the replacement of missing materials following inventory and the update of cataloging records following inventory or weeding

49. Work with reader services and circulation staff members to draft procedures for identifying materials which should be reviewed for possible weeding

Other

50. Make preliminary selection of forms and/or develop draft record formats for all collection maintenance files and operations

51. Assess performance of existing equipment/systems/supplies used in collection maintenance and investigate capabilities of other equipment/systems/supplies

52. Recommend acquisition of new/additional equipment/systems/supplies

53. Train staff and helpers/volunteers in operation and in-house maintenance of equipment/systems

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COLLECTION MAINTENANCE MID LEVEL

Other (cont'd)

54. Supervise in-house operation and maintenance of equipment/systems

55. Gather information for maintenance contracts on equipment/systems

56. Draft statements of work for contact proposals for services, systems, equipment and/or maintenance

57. Evaluate contractors' proposals

58. Train and supervise entry level staff

59. Assist in the selection of new professional staff

60. Write articles for professional journals/newsletters when appropriate

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COLLECTION MAINTENANCE SENIOR LEVEL

Storage Maintenance

61. Work with the circulation section to identify the most heavily used portions of the collections and to select the type and placement of storage equipment and location guides which would enable users to more easily access library materials

62. Work with selection staff to identify areas of anticipated large growth in the collections and to establish the average growth rate for all areas of the collections

63. Draft a shelving plan to provide adequate space for growth of the collections

Preservation

64. Identify optimum physical conditions for storing various types of media

65. Recommend improvements which could be made in current conditions to improve preservation of media center materials

66. Draft a plan for regular vermin control in the media center

67. Draft an emergency plan for dealing with possible water and smoke damage to the collections

ACTIVITIES

COLLECTION MAINTENANCE SENIOR LEVEL

Preservation (cont'd)

68. Draft a policy statement concerning the preservation versus the replacement of media center materials

69. Draft guidelines for staff to use in selecting materials for cleaning, repair, reinforcement, binding, or replacement

70. Work with selection, reader services and reference staff to identify materials which should be retained in microform for preservation

71. Work with selection, reader services and reference staff to identify valuable materials in the collection which require special treatment

Binding

72. Evaluate the performance of the binder(s)

Inventory and Weeding

73. Draft procedures for conducting the inventory of the collections

74. Recommend the frequency at which inventories should be conducted

75. Prepare a draft final report on the status of the collections following inventory

Other

76. Function as a technical expert in all matters related to collection maintenance operations

77. Draft revisions to collection maintenance policies and procedures as required

78. Flowchart and document collection maintenance

79. Assist section manager in on-going systems analysis of the section

80. Analyze collection maintenance statistics and prepare draft statistical reports

81. Analyze financial data and prepare draft financial reports on expenditures for collection maintenance

82. Train and supervise mid level staff

83. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

KNOWLEDGE

COLLECTION MAINTENANCE ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

** knowledge of the primary subject field of users served (e.g., literature, music, etc.)
*** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

** knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
* knowledge of available and emerging information technologies and their applications
** knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
* knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
knowledge of the variety of work settings and their organizational structures
* knowledge of the functions performed within the various work settings and the services and products offered
* knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

*** knowledge of the collection maintenance function, the range of services and products offered (both actual and potential)
*** knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
*** knowledge of collection maintenance tools and sources of information
*** knowledge of collection maintenance methods and techniques
** knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

COLLECTION MAINTENANCE — ENTRY LEVEL

Knowledge of how to do work

*** knowledge of how to perform the various activities
*** knowledge of how to use the collection maintenance tools and sources
*** knowledge of how to apply the collection maintenance methods and techniques
* knowledge of personnel procedures

Knowledge of the institution served and its library

* knowledge of the mission, goals and objectives of the institution served
* knowledge of the structure of the institution and the role of the library within the institution
* knowledge of the various programs offered and key personnel within the institution
*** knowledge of the policies and procedures relevant to the library
*** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
*** knowledge of the users' information needs and requirements
*** knowledge of the collection, and of related collections

COLLECTION MAINTENANCE — MID LEVEL

** greater depths of knowledge specified above
** knowledge of the operations of other sections in the library and how they relate to collection maintenance
* knowledge of available vendor-supplied systems, services and products to support collection maintenance
* knowledge of the contracting process, both in general and within the organization
* knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

COLLECTION MAINTENANCE SENIOR LEVEL

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* greater depths of knowledge specified above
* knowledge of public relations techniques
knowledge of statistical description, analysis, interpretation and presentation
** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
knowledge of cost analysis and interpretation methods
* knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the library
* state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

KNOWLEDGE

COLLECTION MAINTENANCE ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- ** knowledge of the primary subject field of users served (e.g., literature, music, etc.)
- ** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- ** knowledge of definition, structure, and formats of information
- ** knowledge of alternative approaches to the organization of information
- *** knowledge of alternative approaches to retrieval of information
- ** knowledge of alternative approaches to information management
- ** knowledge of available and emerging information technologies and their applications
- ** knowledge of completed and ongoing research in the field and its applicability to practice
- ** knowledge of career opportunities
- ** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- ** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- ** knowledge of the variety of work settings and their organizational structures
- ** knowledge of the functions performed within the various work settings and the services and products offered
- ** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- ** knowledge of the collection maintenance function, the range of services and products offered (both actual and potential)
- ** knowledge of the activities that are required to offer the services and produce the products
- ** knowledge of the various resources that are necessary to support the activities
- ** knowledge of collection maintenance tools and sources of information
- ** knowledge of collection maintenance methods and techniques
- ** knowledge of performance expected and how it can be measured
- ** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

COLLECTION MAINTENANCE ENTRY LEVEL

Knowledge of how to do work

- ** knowledge of how to perform the various activities
- ** knowledge of how to use the collection maintenance tools and sources
- ** knowledge of how to apply the collection maintenance methods and techniques
- ** knowledge of personnel procedures

Knowledge of the institution served and its library

- ** knowledge of the mission, goals and objectives of the institution served
- ** knowledge of the structure of the institution and the role of the library within the institution
- ** knowledge of the various programs offered and key personnel within the institution
- ** knowledge of the policies and procedures relevant to the library
- ** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
- ** knowledge of the users' information needs and requirements
- ** knowledge of the collection, and of related collections

COLLECTION MAINTENANCE MID LEVEL

- ** greater depths of knowledge specified above
- ** knowledge of the operations of other sections in the library and how they relate to collection maintenance
- ** knowledge of available vendor-supplied systems, services and products to support collection maintenance
- ** knowledge of the contracting process, both in general and within the organization
- ** knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

COLLECTION MAINTENANCE SENIOR LEVEL

** greater depths of knowledge specified above
** knowledge of public relations techniques
** knowledge of statistical description, analysis, interpretation and presentation
** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
** knowledge of cost analysis and interpretation methods
** knowledge of methods of resource allocation
** knowledge of standards, measures and methods for evaluating personnel
** knowledge of alternative management structures and their implications for the operation of the library
** state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

SKILLS

COLLECTION MAINTENANCE
ENTRY LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

*** perform each activity
  * establish rapport with users and colleagues
 ** communicate well by written, verbal and non-verbal means
    conduct an interview
  * conduct meetings with individuals and groups
  * collect, analyze and interpret data
 ** make decisions and recommendations based on available information
  * supervise staff
  * work independently and in groups
  * develop criteria for evaluation

Ability to:

*** make effective, timely, and well-informed decisions
  * isolate and define problems and develop the necessary criteria and action for their solution
*** manage time effectively

COLLECTION MAINTENANCE
MID LEVEL

Skills Related to Each Specific Activity

*** Skills listed above are developed to a greater extent

Ability to:

 ** perceive the needs of the organization and not just the library
*** anticipate long-range needs of library
*** design systems and procedures to improve library operations
    arbitrate and negotiate

COLLECTION MAINTENANCE SENIOR LEVEL

*** Skills listed above are developed to a greater extent

Ability to:

** apply methods of measurement and evaluation
*** budget and make projections
*** optimize the use of library resources

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

SKILLS

COLLECTION MAINTENANCE ENTRY LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

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COLLECTION MAINTENANCE MID LEVEL

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SKILLS

COLLECTION MAINTENANCE SENIOR LEVEL

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Ability to:

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COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

ATTITUDES

COLLECTION MAINTENANCE

Dispositional Attitudes

Attitudes Toward Institutions

* Respect for profession
*** Respect for the library
*** Respect for the parent organization

Attitudes Toward Other People

Toward Users

*** Respect users
* Like people in general
*** Like children
*** Like to help people
* Like to meet people
* Like to make others feel comfortable
*** Sensitive to others' needs

Toward Others in the Workplace

*** Respect co-workers
** Like to work with others/as a team
* Like to work on own
* Willingness to draw upon and share knowledge and experience with others
** Supportive of co-workers
* Enjoy managing/supervising others

Personal Qualities

* Alertness
** Assertiveness
* Compassion/Kindness
** Confidence
** Cheerfulness
*** Dependability
** Determination/Tenacity
* Diplomacy
* Emotional stability
* Fairness
*** Flexibility/Versatility
* Imagination
* Inquisitiveness
* Leadership ability

ATTITUDES

COLLECTION MAINTENANCE

Personal Qualities (cont'd)

* Neatness
* Need for achievement
*** Objectivity
*** Open-mindedness
* Optimism/Positive attitude
*** Organization
* Patience
** Physical endurance
*** Resourceful
* Sensitive/Thoughtful
** Sense of humor
** Sense of ethics
* Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

*** Willingness to take/accept responsibility
* Willingness to take initiative
** Willingness to respond to authority, apply and follow policy
* Desire to learn/try
*** Willingness to fail
** Willingness to ask questions
*** Desire to work to best of ability
** Responsiveness to time constraints
*** Accuracy
* Willingness to get hands dirty
** Attention to detail
* Willingness to do clerical tasks
*** Desire to follow-through
** Service orientation
* Organizational identity
* Willingness to promote library and its services
* View of library as part of a larger information environment
* View of library as an organization
* Ability to see broad picture
* Ability to sacrifice short-term gains for long-term goals
Political sense
* Curiosity
* Variety of interests
* Desire to grow personally
* Desire to grow professionally
* Desire to remain current in specific and general subject field
*** Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

ATTITUDES

COLLECTION MAINTENANCE

Dispositional Attitudes

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COLLECTION MAINTENANCE

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* Desire to grow professionally
* Desire to remain current in specific and general subject field
* Positive attitude toward job

SCHOOL LIBRARIAN COMPETENCIES

INTERLIBRARY LOAN

ACTIVITIES

INTERLIBRARY LOAN | **ENTRY LEVEL**

Interlibrary Borrowing (ILB)

1. Receive users' requests for obtaining material from other media centers in the system or from state/local agencies which specifically support media needs of schools; refer users to local public library facilities, when appropriate

2. Discuss time constraints, and, if applicable, cost consideration with users

3. Record bibliographic and user information

4. Verify bibliographic information

5. Determine best source for obtaining materials

6. Determine alternate source(s) for obtaining materials as required

7. Supervise processing of ILB requests:

   complete loan forms, including copyright compliance notice
   collect/charge ILB processing cost, if applicable
   transmit loan requests (by phone, mail, courier, teletype, or computer network)
   re-issue loan requests as required
   receive materials
   notify users of receipt of materials
   circulate materials to users
   update circulation/ILB files for circulated materials
   receive materials from users
   examine materials for damage, proper markings, etc.
   update circulation/ILB files for returned materials
   prepare borrowed materials for mailing/delivery
   follow-up overdues
   collect/charge overdue fines, if applicable
   maintain record of ILB statistics
   maintain record of funds collected/charged
   maintain files of materials obtained and not obtained on loan

8. Perform processing of ILB requests when necessary

INTERLIBRARY LOAN **ENTRY LEVEL**

Interlibrary Lending (ILL)

9. Receive ILL requests from other media centers in the system

10. Examine ILL forms for copyright compliance

11. Supervise processing of ILL requests:

    return ILL forms lacking proper copyright compliance notice
    determine location of material in library
    locate material in the collection
    photocopy journal articles and portions of printed materials
    prepare library materials/photocopies for mailing/delivery
    update circulation/ILL files for loaned materials
    examine returned materials for damage, proper markings, etc.
    update circulation/ILL files for returned materials
    shelve returned materials
    follow-up overdues
    collect/charge overdue fines, if appropriate
    collect funds for lost materials or receive replacement materials
    return ILL forms to originator for materials not owned/not available for loan
    maintain record of ILL statistics
    maintain record of funds collected or charges assessed, if appropriate
    maintain temporary files for ILL requests for materials owned but not found in the collection
    maintain temporary file of ILL requests for materials not owned by the library

12. Check to locate ILL requests that are reported as "not found on shelf"

13. Perform processing of ILL requests when necessary

Other

14. Handle problems related to borrowing or lending of library materials

15. Keep informed of current copyright legislation and its impact on interlibrary loan

16. Conduct library business by phone, when appropriate

17. Write memos and letters, as required

ACTIVITIES

INTERLIBRARY LOAN ENTRY LEVEL

Other (cont'd)

18. Prepare manuals of procedures
19. Make recommendations to the media center director for improvement in ILL/ILB operations
20. Attend and participate in staff meetings
21. Provide an overview of the operations of the media center to visitors, as requested
22. Supervise technicians, paraprofessional staff, student helpers and adult volunteers
23. Work to develop "esprit de corps" among staff supervised
24. Assist media center director in writing job descriptions for self and for staff supervised
25. Assist media center director in developing performance standards for self and for staff supervised
26. Assist media center director in the review and performance evaluation of staff supervised
27. Assist in the selection of new technicians and paraprofessionals
28. Keep abreast of developments in the information field, library and media center practice, or legislation that affect interlibrary borrowing and lending
29. Attend professional meetings and prepare reports for dissemination to staff
30. Develop professional contacts both within and outside the media center

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INTERLIBRARY LOAN MID LEVEL

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31. Forward ILL "not found" and "not owned" requests and ILB requests to the central acquisitions section for selection review
32. Make preliminary selection of forms and/or develop draft record formats for all interlibrary loan files and operations
33. Work with circulation staff to develop procedures and resolve problems related to use of the circulation files/system for interlibrary loan purposes
34. Assess performance of existing equipment/systems used in interlibrary loan and investigate capabilities of other equipment/systems
35. Recommend acquisition of new/additional equipment/systems
36. Train staff and student helpers/volunteers in operation and in-house maintenance of equipment/systems
37. Supervise in-house operation and maintenance of equipment/systems
38. Gather information for maintenance contracts on equipment/systems
39. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance
40. Evaluate contractors' proposals
41. Train and supervise entry level staff
42. Assist in the selection of new professional staff
43. Write articles for professional journals/newsletters when appropriate

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INTERLIBRARY LOAN SENIOR LEVEL

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44. Function as a technical expert in the interlibrary loan section
45. Work with centralized serials control and cataloging staff to develop a serials holdings list for all media centers in the school system
46. Make inquiries and recommendations concerning the advertisement, publication, and distribution of the serials holdings list

ACTIVITIES

INTERLIBRARY LOAN SENIOR LEVEL

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47. Work with reference and acquisitions staff to analyze library resources in the area (especially public libraries) and make recommendations concerning the degree to which duplication of collections should occur. Identify subject areas in which resource sharing may be mutually beneficial

48. Identify library/media center networks/consortia to which the media center belongs

49. Draft ILL/ILB procedures and policies; draft revisions as required

50. Flowchart and document ILL/ILB procedures

51. Assist media center director in on-going systems analysis of the section

52. Analyze ILL/ILB statistics and prepare draft statistical reports

53. Analyze financial data and prepare draft financial reports

54. Supervise mid level staff

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

KNOWLEDGE

INTERLIBRARY LOAN ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g., literature, music, etc.)
** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

* knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
knowledge of alternative approaches to information management
knowledge of available and emerging information technologies and their applications
* knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
* knowledge of the variety of work settings and their organizational structures
* knowledge of the functions performed within the various work settings and the services and products offered
* knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

*** knowledge of the interlibrary loan function, the range of services and products offered (both actual and potential)
** knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
** knowledge of interlibrary loan tools and sources of information
*** knowledge of interlibrary loan methods and techniques
* knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

INTERLIBRARY LOAN ENTRY LEVEL

Knowledge of how to do work

*** knowledge of how to perform the various activities
*** knowledge of how to use the interlibrary loan tools and sources
*** knowledge of how to apply the interlibrary loan methods and techniques
*** knowledge of personnel procedures

Knowledge of the institution served and its library

* knowledge of the mission, goals and objectives of the institution served
* knowledge of the structure of the institution and the role of the library within the institution
knowledge of the various programs offered and key personnel within the institution
** knowledge of the policies and procedures relevant to the library
* knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
** knowledge of the users' information needs and requirements
** knowledge of the collection, and of related collections

INTERLIBRARY LOAN MID LEVEL

---

* greater depths of knowledge specified above
* knowledge of the operations of other sections in the library and how they relate to interlibrary loan
* knowledge of available vendor-supplied systems, services and products to support interlibrary loan
* knowledge of the contracting process, both in general and within the organization
* knowledge of evaluation methods and techniques to evaluate systems, services and products

KNOWLEDGE

INTERLIBRARY LOAN **SENIOR LEVEL**

---

* greater depths of knowledge specified above
* knowledge of public relations techniques
* knowledge of statistical description, analysis, interpretation and presentation
*** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
* knowledge of cost analysis and interpretation methods
* knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the library
state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

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*** state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

SKILLS

INTERLIBRARY LOAN ENTRY LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

** perform each activity
* establish rapport with users and colleagues
** communicate well by written, verbal and non-verbal means
** conduct an interview
conduct meetings with individuals and groups
* collect, analyze and interpret data
** make decisions and recommendations based on available information
supervise staff
* work independently and in groups
develop criteria for evaluation

Ability to:

* make effective, timely, and well-informed decisions
* isolate and define problems and develop the necessary criteria and action for their solution
** manage time effectively

INTERLIBRARY LOAN MID LEVEL

Skills Related to Each Specific Activity

*** Skills listed above are developed to a greater extent

Ability to:

perceive the needs of the organization and not just the library
* anticipate long-range needs of library
** design systems and procedures to improve library operations
* arbitrate and negotiate

SKILLS

INTERLIBRARY LOAN SENIOR LEVEL

*** Skills listed above are developed to a greater extent

Ability to:

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SKILLS

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COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

ATTITUDES

INTERLIBRARY LOAN

Dispositional Attitudes

Attitudes Toward Institutions

* Respect for profession
** Respect for the library
* Respect for the parent organization

Attitudes Toward Other People

Toward Users

*** Respect users
* Like people in general
** Like children
*** Like to help people
* Like to meet people
* Like to make others feel comfortable
*** Sensitive to others' needs

Toward Others in the Workplace

* Respect co-workers
* Like to work with others/as a team
Like to work on own
* Willingness to draw upon and share knowledge and experience with others
* Supportive of co-workers
Enjoy managing/supervising others

Personal Qualities

* Alertness
*** Assertiveness
* Compassion/Kindness
* Confidence
*** Cheerfulness
* Dependability
Determination/Tenacity
* Diplomacy
Emotional stability
* Fairness
* Flexibility/Versatility
* Imagination
Inquisitiveness
* Leadership ability

Personal Qualities (cont'd)

* Neatness
* Need for achievement
* Objectivity
* Open-mindedness
* Optimism/Positive attitude
** Organization
Patience
** Physical endurance
** Resourceful
* Sensitive/Thoughtful
* Sense of humor
* Sense of ethics
* Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

** Willingness to take/accept responsibility
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* Willingness to fail
* Willingness to ask questions
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* Willingness to get hands dirty
* Attention to detail
* Willingness to do clerical tasks
** Desire to follow-through
* Service orientation
* Organizational identity
Willingness to promote library and its services
* View of library as part of a larger information environment
View of library as an organization
* Ability to see broad picture
* Ability to sacrifice short-term gains for long-term goals
* Political sense
Curiosity
* Variety of interests
* Desire to grow personally
Desire to grow professionally
Desire to remain current in specific and general subject field
* Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

ATTITUDES

INTERLIBRARY LOAN

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Toward Users

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Toward Others in the Workplace

- * Willingness to draw upon and share knowledge and experience with others

Personal Qualities

- * Fairness
- * Flexibility/Versatility
- * Imagination
- * Leadership ability
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INTERLIBRARY LOAN

Attitudes Related to Job/Work/Organization (cont'd)

** Ability to see broad picture
** Ability to sacrifice short-term gains for long-term goals
** Political sense
* Desire to grow professionally
** Desire to remain current in specific and general subject field

SCHOOL LIBRARIAN COMPETENCIES

MANAGEMENT

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Section Manager)

General Administration

1. Work with library/library system director and other section/branch managers to formulate and/or interpret library objectives
2. Prepare written section/branch objectives
3. Coordinate section/branch objectives with those of other sections/branches of the library system
4. Evaluate current activities in terms of the section/branch's objectives
5. Identify required statistics and reports
6. Prepare final version of section's/branch's annual reports and other reports
7. Supervise clerical staff who

    type correspondence, reports, etc.
    answer phones
    sort and route mail
    maintain section/branch files and records
    input and maintain payroll data

Planning

8. Maintain an awareness of the current and planned information and service needs of the user community
9. Assess future needs and develop long-range plans
10. Recommend new activities/programs when appropriate

Financial Management

11. Prepare operating and capital budgets, both short- and long-term
12. Justify the section's/branch's budgets
13. Control expenditures and operate within the budgets
14. Establish financial policies and procedures in keeping with the library system's overall financial operations
15. Establish costs for services, if appropriate

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Section Manager)

Financial Management

16. Supervise charging for services, if appropriate

17. Determine the cost of in-house versus contract processing and services

18. Supervise the deposit of any funds received

Policies and Procedures

19. Review and approve/modify section/branch policies as drafted by senior staff

20. Present policies to library/library system director for approval

21. Monitor established policies and guidelines

22. Revise policies and guidelines as required

23. Review and approve/modify procedures recommended by staff

Management of Activities

24. Supervise overall operation of the section/branch

25. Coordinate section/branch activities with other operations within the library system

26. Supervise the establishment of work schedules to ensure adequate staffing of the section/branch

27. Supervise the maintenance of adequate production levels, production deadlines and quality control

28. Identify activities which could be curtailed if staff reduction and/or budget cuts were required

Systems Analysis and Design

29. Perform on-going systems analysis of section/branch activities

30. Review and approve/modify record formats and other file design data for section/branch files as recommended by staff

31. Work with systems staff/representatives and section/branch staff to resolve problems with operation of automated systems, if applicable

ACTIVITIES

Facilities, Equipment and Supplies, and Contract Services

32. Work with architects and interior designers to plan section/branch design and layout for new facilities

33. Plan the rearrangement of existing facilities

34. Select furnishings for section/branch

35. Request maintenance of facilities as required

36. Review and approve/modify staff recommendations for acquisition of equipment, forms, supplies and systems

37. Recommend and support acquisition of selected items

38. Arrange for purchase of approved items

39. Maintain inventory listings of furnishings and equipment in section/branch

40. Review and approve/modify final draft of contract-related documentation

41. Designate a staff member to serve as the section's/branch's technical representative for each contract

42. Evaluate contractors' performance

Personnel Management and Staff Development

43. Review staffing and work loads to ensure that employees are properly utilized

44. Prepare final version of job descriptions for entire staff of section/branch

45. Request and justify new positions

46. Initiate staff recruitment after staffing requests are approved

47. Interview and select candidates for positions

48. Ensure that new staff receive proper orientation and on-the-job training

49. Review personnel records of staff

ACTIVITIES

MANAGEMENT | SENIOR LEVEL (Section Manager)

Personnel Management and Staff Development

50. Approve/modify performance standards as developed by staff

51. Prepare written performance evaluations for entire staff

52. Conduct conferences with individual staff members to discuss performance evaluations and other matters as appropriate

53. Suggest ways in which individual staff members may improve performance and/or become eligible for promotion

54. Approve library-funded training for staff

55. Prepare documentation for awards, grievance actions, separations, etc.

56. Present awards

57. Discipline staff as required

58. Conduct exit interviews with staff

59. Approve leave

60. Approve vacation schedules

Communications

61. Conduct staff meetings

62. Ensure that communication is maintained within the section/branch so that staff will know what is happening in the section/branch, the library system, the advisory groups, the network(s), and in the information world in general

63. Establish and maintain good working relationships within the library system

64. Make preliminary arrangements for cooperative efforts with other sections/branches

65. Represent section/branch or designate representative(s) for joint projects with other areas of the library system

ACTIVITIES

MANAGEMENT

SENIOR LEVEL
(Section Manager)

Marketing and Public Relations

66. Establish and maintain good working relationships with librarians from other libraries in the area

67. Communicate with other libraries regarding any difficulties associated with cooperative activities

68. Join/participate in forming library networks/consortia and support network goals and activities

69. Receive official visitors to the section/branch

70. Arrange for overviews/tours of the section's/branch's operations

71. Coordinate the production of publications/information products by section/branch staff

72. Ensure that documents describing the section/branch and its policies and procedures are up-to-date

73. Approve/make arrangements for advertisement, publication, and distribution of documents/information products produced by section/branch staff

Research and Development

74. Identify problem areas related to the section's/branch's activities/objectives which require further study

75. Arrange for and monitor in-house or contract studies of the problem areas

76. Evaluate the recommendations of the studies

77. Implement new programs/procedures as appropriate

ACTIVITIES

MANAGEMENT	SENIOR LEVEL (Library Director/ Library System Director)

General Administration

1. Work with senior institutional administrators to formulate and/or interpret objectives of the library/library system

2. Supervise the preparation of written library/library system objectives

3. Coordinate library/library system objectives with those of other systems within the institution

4. Evaluate current activities in terms of the library's/library system's objectives

5. Identify required statistics and reports

6. Prepare final version of library's/library system's annual reports and other reports

7. Supervise clerical staff who

    type correspondence, reports, etc.
    answer phones
    sort and route mail
    maintain files and records
    input and maintain payroll data

Planning

8. Maintain an awareness of the current and planned information and service needs of the user community

9. Assess future needs and develop long-range plans

10. Recommend new activities/programs when appropriate

Financial Management

11. Supervise the preparation of operating and capital budgets, both short- and long-term

12. Justify the library's/library system's budgets to institutional administrators

13. Supervise expenditure and control and operatation within the budgets

ACTIVITIES

SENIOR LEVEL
(Library Director/
Library System Director)

MANAGEMENT

Financial Management

14. Establish financial policies and procedures in keeping with the institution's overall financial operations

15. Supervise the establishment costs for services, if appropriate

16. Supervise charging for services, if appropriate

17. Supervise the determination of the cost of in-house versus contract processing and services

18. Supervise the deposit of funds received by the library/library system

Policies and Procedures

19. Review and approve/modify library/library system policies as drafted by senior staff

20. Present policies to institutional administrators for concurrence

21. Supervise the monitoring of established policies and guidelines

22. Supervise the revision of policies and guidelines as required

23. Review and approve/modify procedures recommended by staff

Management of Activities

24. Supervise overall operation of the library/library system

25. Coordinate library/library system activities with the institution

26. Supervise the establishment of work schedules to ensure adequate staffing of the library/library system

27. Supervise the maintenance of adequate production levels, production deadlines and quality control

28. Identify activities which could be curtailed if staff reduction and/or budget cuts were required

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MANAGEMENT	SENIOR LEVEL (Library Director/ Library System Director)

Systems Analysis and Design

29. Supervise the on-going systems analysis of library/library system activities

30. Review and approve/modify file design data for library/library system files as recommended by staff

31. Supervise efforts of senior staff to resolve problems with operation of automated systems, if applicable

Facilities, Equipment and Supplies, and Contract Services

32. Select and justify locations of new facilities and collections

33. Work with architects and interior designers to plan the overall design and layout for new facilities

34. Supervise planning for rearrangement of existing facilities

35. Supervise selection of furnishings for library facilities

36. Supervise maintenance of facilities as required

37. Review and approve/modify staff recommendations for acquisition of equipment, forms, supplies and systems

38. Justify acquisition of selected items to institutional administrators

39. Supervise for purchase of approved items

40. Supervise maintenance of inventory listings of furnishings and equipment in the library/library system

41. Review and approve/modify major contract documentation

42. Supervise in-house management of contract activity

43. Supervise the evaluation of contractors' performance

MANAGEMENT	SENIOR LEVEL (Library Director/ Library System Director)

Personnel Management and Staff Development

44. Supervise staff review of staffing and work loads to ensure that employees are properly utilized

45. Review/prepare final version of job descriptions for senior staff of library/library system and for staff in the director's office

46. Request and justify new positions

47. Supervise staff recruitment after staffing requests are approved

48. Interview and select candidates for senior staff positions and for director's staff

49. Ensure that new staff receive proper orientation and on-the-job training

50. Review personnel records of senior and director's staff

51. Approve/modify performance standards as developed by senior and director's staff

52. Prepare written performance evaluations for senior and director's staff

53. Conduct conferences with individual members of senior and director's staff to discuss performance evaluations and other matters as appropriate

54. Suggest ways in which individual members of senior and director's staff may improve performance and/or become eligible for promotion

55. Approve library-funded training for senior and director's staff

56. Review/prepare documentation for awards, grievance actions, separations, etc.

57. Present awards

58. Discipline senior and director's staff as required

59. Conduct exit interviews with senior and director's staff and other staff, as appropriate

60. Approve leave for senior and director's staff

61. Approve vacation schedules for senior and director's staff

ACTIVITIES

SENIOR LEVEL
(Library Director/
MANAGEMENT Library System Director)

Communications

62. Attend staff meetings of senior institution staff as the representative of the library/library system

63. Conduct staff meetings of senior and director's staff

64. Ensure that communication is maintained within the library/library system so that staff will know what is happening in the library, the library system, the advisory groups, the network(s), and in the information world in general

65. Establish and maintain good working relationships within the library/library system and within the sponsoring institution

66. Make preliminary arrangements for cooperative efforts with other libraries/library systems and/or with library/bibliographic networks

67. Represent the library/library system or designate representative(s) for joint projects with other libraries/library systems and/or with library/bibliographic networks

Marketing and Public Relations

68. Market the library/library system and its services to higher level institutional administrators

69. Supervise the marketing of the library/library system and its services to the user community

70. Establish and maintain good working relationships with librarians from other libraries/systems/networks

71. Communicate with other libraries/systems/networks regarding any difficulties associated with cooperative activities

72. Join/participate in forming library networks/consortia and support network goals and activities

73. Receive official visitors to the library/library system

74. Supervise arrangements for overviews/tours of the library/library system

75. Supervise the coordination of the production of publications/ information products by library/library system

ACTIVITIES

SENIOR LEVEL
(Library Director/
Library System Director)

MANAGEMENT

Marketing and Public Relations

76. Ensure that documents describing the library/library system and its policies and procedures are up-to-date

77. Approve/modify/recommend arrangements for advertisement, publication, and distribution of documents/information products produced by library/library system

Research and Development

78. Identify and/or review problem areas related to the library's/library system's activities/objectives which require further study

79. Review, approve/modify in-house or contract studies of the problem areas

80. Review and approve/modify evaluations by senior staff of studies' recommendations

82. Approve and supervise implementation of new programs/procedures as appropriate

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

KNOWLEDGE

MANAGEMENT SENIOR LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g., literature, music, etc.)
* knowledge of foreign languages

Library & Information Science Knowledge (Generic)

*** knowledge of definition, structure, and formats of information
** knowledge of alternative approaches to the organization of information
** knowledge of alternative approaches to retrieval of management information
** knowledge of alternative approaches to information management
* knowledge of available and emerging information technologies and their applications
* knowledge of completed and ongoing research in the field and its applicability to practice
** knowledge of career opportunities
*** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
* knowledge of the variety of work settings and their organizational structures
* knowledge of the functions performed within the various work settings and the services and products offered
** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

** knowledge of the management function, the range of services and products offered (both actual and potential)
** knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
*** knowledge of management tools and sources of information
*** knowledge of management methods and techniques
*** knowledge of performance expected and how it can be measured
** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

MANAGEMENT **SENIOR LEVEL**

Knowledge of how to do work

*** knowledge of how to perform the various activities
** knowledge of how to use the management tools and sources of management information
*** knowledge of how to apply the management methods and techniques
* knowledge of personnel procedures
** knowledge of the operations of other sections in the library and how they related to management
* knowledge of available vendor-supplied systems, services and products to support management
* knowledge of the contracting process, both in general and within the organization
* knowledge of evaluation methods and techniques to evaluate systems, services and products
* knowledge of public relations techniques
* knowledge of statistical description, analysis, interpretation and presentation
*** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
* knowledge of cost analysis and interpretation methods
* knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the library
*** state-of-the-art knowledge of library research and practice

Knowledge of the institution served and its library

*** knowledge of the mission, goals and objectives of the institution served
*** knowledge of the structure of the institution and the role of the library within the institution
*** knowledge of the various programs offered and key personnel within the institution
*** knowledge of the policies and procedures relevant to the library
*** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
*** knowledge of the users' information needs and requirements
*** knowledge of the collection, and of related collections

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

KNOWLEDGE

MANAGEMENT SENIOR LEVEL

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*** knowledge of the users' information needs and requirements
*** knowledge of the collection, and of related collections

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

SKILLS

MANAGEMENT SENIOR LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

** perform each activity
** establish rapport with users and colleagues
*** communicate well by written, verbal and non-verbal means
* conduct an interview
* conduct meetings with individuals and groups
* collect, analyse and interpret data
*** make decisions and recommendations based on available information
* supervise staff
* work independently and in groups
* develop criteria for evaluation

Ability to:

*** make effective, timely, and well-informed decisions
*** isolate and define problems and develop the necessary criteria and action for their solution
*** manage time effectively

Skills Related to Each Specific Activity

Ability to:

*** perceive the needs of the organization and not just the library
*** anticipate long-range needs of library
*** design systems and procedures to improve library operations
* arbitrate and negotiate
* apply methods of measurement and evaluation
*** budget and make projections
*** optimize the use of library resources

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

SKILLS

MANAGEMENT SENIOR LEVEL

Skills Related to Specific Activities

Ability to:

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** communicate well by written, verbal and non-verbal means
** conduct an interview
** conduct meetings with individuals and groups
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*** budget and make projections
*** optimize the use of library resources

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

ATTITUDES

MANAGEMENT

Dispositional Attitudes

Attitudes Toward Institutions

** Respect for profession
*** Respect for the library
*** Respect for the parent organization

Attitudes Toward Other People

Toward Users

*** Respect users
* Like people in general
** Like children
** Like to help people
* Like to meet people
* Like to make others feel comfortable
** Sensitive to others' needs

Toward Others in the Workplace

*** Respect co-workers
** Like to work with others/as a team
Like to work on own
** Willingness to draw upon and share knowledge and experience with others
** Supportive of co-workers
*** Enjoy managing/supervising others

Personal Qualities

* Alertness
* Assertiveness
* Compassion/Kindness
*** Confidence
* Cheerfulness
*** Dependability
* Determination/Tenacity
** Diplomacy
** Emotional stability
** Fairness
*** Flexibility/Versatility
** Imagination
* Inquisitiveness
** Leadership ability

ATTITUDES

MANAGEMENT

Personal Qualities (cont'd)

** Neatness
* Need for achievement
** Objectivity
*** Open-mindedness
*** Optimism/Positive attitude
*** Organization
* Patience
* Physical endurance
*** Resourceful
* Sensitive/Thoughtful
** Sense of humor
*** Sense of ethics
* Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

*** Willingness to take/accept responsibility
*** Willingness to take initiative
** Willingness to respond to authority, apply and follow policy
*** Desire to learn/try
Willingness to fail
*** Willingness to ask questions
** Desire to work to best of ability
*** Responsiveness to time constraints
** Accuracy
Willingness to get hands dirty
*** Attention to detail
* Willingness to do clerical tasks
*** Desire to follow-through
** Service orientation
* Organizational identity
*** Willingness to promote library and its services
** View of library as part of a larger information environment
** View of library as an organization
** Ability to see broad picture
** Ability to sacrifice short-term gains for long-term goals
** Political sense
** Curiosity
* Variety of interests
* Desire to grow personally
** Desire to grow professionally
* Desire to remain current in specific and general subject field
*** Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

ATTITUDES

MANAGEMENT

Dispositional Attitudes

Attitudes Toward Institutions

- * Respect for profession
- * Respect for the library
- * Respect for the parent organization

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- ** Respect users
- ** Like people in general
- ** Like children
- ** Like to help people
- ** Like to meet people
- ** Like to make others feel comfortable
- ** Sensitive to others' needs

Toward Others in the Workplace

- ** Respect co-workers
- ** Like to work with others/as a team
- Like to work on own
- ** Willingness to draw upon and share knowledge and experience with others
- ** Supportive of co-workers
- ** Enjoy managing/supervising others

Personal Qualities

- ** Alertness
- ** Assertiveness
- ** Compassion/Kindness
- ** Confidence
- ** Cheerfulness
- ** Dependability
- ** Determination/Tenacity
- ** Diplomacy
- ** Emotional stability
- ** Fairness
- ** Flexibility/Versatility
- ** Imagination
- ** Inquisitiveness
- ** Leadership ability

Personal Qualities (cont'd)

** Neatness
** Need for achievement
** Objectivity
** Open-mindedness
** Optimism/Positive attitude
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** Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

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** Desire to work to best of ability
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** Ability to see broad picture
** Ability to sacrifice short-term gains for long-term goals
** Political sense
** Curiosity
** Variety of interests
** Desire to grow personally
** Desire to grow professionally
** Desire to remain current in specific and general subject field
** Positive attitude toward job

SCHOOL LIBRARIAN COMPETENCIES

REFERENCE

ACTIVITIES

REFERENCE ENTRY LEVEL

Solicited Searches

1. Interview users to evaluate information requirements, and determine budgetary and time constraints, etc.

2. Counsel users on specifying information requirements

3. Develop and implement strategy for obtaining, evaluating, and packaging information and data to meet users' needs

4. Select search methods (e.g., online and/or manual)

5. Determine appropriate source (e.g., databases, printed publications, experts, etc.)

6. Conduct searches, using proper subject terms for sources selected

7. Review retrieval output for relevancy

8. Provide information for users in the form of references or source documents

9. Translate titles and abstracts

10. Refer users to higher-level reference staff, as appropriate

11. Refer users to other information services, as appropriate

Other

12. Answer ready reference questions

13. Instruct users in reference methods, sources, services and policies

14. Alert users to non-print and in-house developed sources of information

15. Perform bibliographic verification as required

16. Recommend acquisition of materials for the reference and general collections

17. Recommend materials/data for inclusion in reference source files (vertical file; in-house indexes)

18. Supervise orderly maintenance of the reference room and re-shelving/ re-filing of reference materials

19. Maintain a record of reference searching statistics

ACTIVITIES

REFERENCE ENTRY LEVEL

Other (cont'd)

20. Maintain a record of financial data (funds received in payment for computerized retrieval, packaged literature searches and other products, or services for which charging may be authorized)
21. Conduct business by phone, when appropriate
22. Write memos and letters, as required
23. Prepare an information package for users to describe reference services and policies
24. Prepare manuals of procedures
25. Make recommendations to the media center director for improvement in operations of the section and for improvement in services to users
26. Attend and participate in staff meetings
27. Provide an overview of the operations of the unit/section to visitors, as requested
28. Supervise technicians, paraprofessional staff, student workers, and adult volunteers
29. Work to develop "esprit de corps" among staff supervised
30. Assist media center director in writing job descriptions for self and for staff supervised
31. Assist media center director in developing performance standards for self and for staff supervised
32. Assist media center director in the review and performance evaluation of staff supervised
33. Assist in the selection of new technicians and paraprofessionals
34. Keep abreast of new and changing reference sources, services and tools
35. Keep abreast of new and developing technologies applicable to reference searching
36. Attend professional meetings and prepare reports for dissemination to staff
37. Develop professional contacts both within and outside the media center system

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Solicited Searches

38. Perform more complex searches

39. Provide additional information for users (e.g. in the form of critical annotations, abstracts, analytical reports, etc.)

Unsolicited Searches

40. Assist in developing broad-scope, published literature searches with executive analyses, resulting from anticipation and recognition of faculty/student information needs

41. Identify topics and develop search strategies

42. Conduct searches

43. Evaluate search results

44. Prepare searches for publication

45. Distribute published literature searches

Other

46. Organize and maintain reference source files (vertical file, in-house indexes)

47. Schedule and supervise shelf reading of the reference collection

48. Make preliminary selection of forms and/or develop draft record formats for all reference files and operations

49. Identify and evaluate commercially available information services

50. Assess performance of existing equipment/systems/services used in reference and investigate capabilities of other equipment/systems/services

51. Recommend acquisition of new/additional equipment/systems/services

52. Train staff and student workers/volunteers in operation and in-house maintenance of equipment/systems/ services

53. Supervise in-house operation and maintenance of equipment/systems/services

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REFERENCE	MID LEVEL

Other (cont'd)

54. Gather information for maintenance contracts on equipment/systems
55. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance
56. Evaluate contractors' proposals
57. Train and supervise entry level staff
58. Assist in the selection of new professional staff
59. Write articles for professional journals/newsletters, when appropriate

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REFERENCE	SENIOR LEVEL

Solicited Searches

60. Review solicited searches performed by others and suggest additional search strategies as appropriate
61. Refer users to subject experts in the area, if appropriate

Unsolicited Searches

62. Review unsolicited searches performed by others and suggest additional search strategies as appropriate
63. Prepare executive analyses for published searches
64. Arrange for publication
65. Develop a public relations strategy for marketing the publication
66. Develop distribution list
67. Develop announcement of publication

ACTIVITIES

REFERENCE SENIOR LEVEL

Other

68. Function as a technical expert in all matters relating to reference service

69. Interact with professional colleagues and faculty in identifying unrecorded/unindexed sources of information and data, and report to staff

70. Review and weed the reference collection on a regular basis

71. Review and weed reference source files on a regular basis

72. Work with reader services, interlibrary loan and selection staff members to analyze library resources in the area and to make recommendations concerning the degree to which duplication of reference collections should occur

73. Work with reader services and selection staff to compile lists of reference books and standard works which comprise a basic collection in each major subject area. New editions of these materials are acquired when published

74. Work with reader services and selection staff and faculty advisors to select materials for branch collections

75. Draft reference service procedures and policies; draft revisions as required

76. Flowchart and document reference service procedures

77. Assist section manager in on-going systems analysis of the section

78. Analyze statistics and prepare draft statistical reports

79. Develop charging strategies

80. Analyze financial data and prepare draft financial reports

81. Handle deposit of funds/assessment of charges

82. Supervise mid level staff

83. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

KNOWLEDGE

REFERENCE ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g. literature, music, etc.)
*** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

* knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
* knowledge of available and emerging information technologies and their applications
* knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
* knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
* knowledge of the variety of work settings and their organizational structures
* knowledge of the functions performed within the various work settings and the services and products offered
** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

*** knowledge of the reference function, the range of services and products offered (both actual and potential)
*** knowledge of the activities that are required to offer the services and produce the products
*** knowledge of the various resources that are necessary to support the activities
*** knowledge of reference/referral tools and sources of information
*** knowledge of reference/referral methods and techniques
* knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

KNOWLEDGE

REFERENCE ENTRY LEVEL

Knowledge of how to do work

*** knowledge of how to perform the various activities
*** knowledge of how to use the reference/referral and other sources
*** knowledge of how to apply the reference/referral methods and techniques
** knowledge of personnel procedures

Knowledge of the institution served and its library

** knowledge of the mission, goals and objectives of the institution served
* knowledge of the structure of the institution and the role of the library within the institution
** knowledge of the various programs offered and key personnel within the institution
*** knowledge of the policies and procedures relevant to the library
*** knowledge of the various resources available within the library (e.g., personnel, equipment, etc.)
*** knowledge of the users' information needs and requirements
*** knowledge of the collection, and of related collections

REFERENCE MID LEVEL

---

* greater depths of knowledge specified above
* knowledge of the operations of other sections in the library and how they relate to reference
knowledge of available vendor-supplied systems, services and products to support reference
* knowledge of the contracting process, both in general and within the organization
* knowledge of evaluation methods and techniques to evaluate systems, services and products
** knowledge of public relations techniques

KNOWLEDGE

REFERENCE SENIOR LEVEL

---

* greater depths of knowledge specified above
* knowledge of statistical description, analysis, interpretation and presentation
** knowledge of the costs associated with library resources (materials, personnel, space, etc.)
* knowledge of cost analysis and interpretation methods
** knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the library
* state-of-the-art knowledge of library research and practice

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

KNOWLEDGE

REFERENCE ENTRY LEVEL

Basic knowledge

- ** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

- * knowledge of the primary subject field of users served (e.g. literature, music, etc.)
- ** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

- * knowledge of definition, structure, and formats of information
- ** knowledge of alternative approaches to the organisation of information
- ** knowledge of alternative approaches to retrieval of information
- ** knowledge of alternative approaches to information management
- *** knowledge of available and emerging information technologies and their applications
- * knowledge of completed and ongoing research in the field and its applicability to practice
- ** knowledge of career opportunities
- ** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

- *** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
- ** knowledge of the variety of work settings and their organisational structures
- ** knowledge of the functions performed within the various work settings and the services and products offered
- ** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

- ** knowledge of the reference function, the range of services and products offered (both actual and potential)
- * knowledge of the activities that are required to offer the services and produce the products
- * knowledge of the various resources that are necessary to support the activities
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COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

SKILLS

REFERENCE ENTRY LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

*** perform each activity
** establish rapport with users and colleagues
* communicate well by written, verbal and non-verbal means
* conduct an interview
* conduct meetings with individuals and groups
* collect, analyze and interpret data
* make decisions and recommendations based on available information
* supervise staff
*** work independently and in groups
* develop criteria for evaluation

Ability to:

* make effective, timely, and well-informed decisions
*** isolate and define problems and develop the necessary criteria and action for their solution
*** manage time effectively

REFERENCE MID LEVEL

Skills Related to Each Specific Activity

*** Skills listed above are developed to a greater extent

Ability to:

** perceive the needs of the organization and not just the library
** anticipate long-range needs of library
** design systems and procedures to improve library operations
* arbitrate and negotiate

REFERENCE	SENIOR LEVEL

*** Skills listed above are developed to a greater extent

Ability to:

- ** apply methods of measurement and evaluation
- *** budget and make projections
- *** optimize the use of library resources

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

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COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

ATTITUDES

REFERENCE

Dispositional Attitudes

Attitudes Toward Institutions

- * Respect for profession
- ** Respect for the library
- ** Respect for the parent organization

Attitudes Toward Other People

Toward Users

- *** Respect users
- * Like people in general
- *** Like children
- *** Like to help people
- ** Like to meet people
- * Like to make others feel comfortable
- ** Sensitive to others' needs

Toward Others in the Workplace

- *** Respect co-workers
- ** Like to work with others/as a team
- * Like to work on own
- *** Willingness to draw upon and share knowledge and experience with others
- ** Supportive of co-workers
- ** Enjoy managing/supervising others

Personal Qualities

- * Alertness
- * Assertiveness
- * Compassion/Kindness
- * Confidence
- * Cheerfulness
- ** Dependability
- * Determination/Tenacity
- * Diplomacy
- * Emotional stability
- * Fairness
- * Flexibility/Versatility
- * Imagination
- * Inquisitiveness
- ** Leadership ability

ATTITUDES

REFERENCE

Personal Qualities (cont'd)

* Neatness
* Need for achievement
* Objectivity
* Open-mindedness
* Optimism/Positive attitude
** Organization
* Patience
** Physical endurance
* Resourceful
* Sensitive/Thoughtful
* Sense of humor
* Sense of ethics
* Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

*** Willingness to take/accept responsibility
*** Willingness to take initiative
* Willingness to respond to authority, apply and follow policy
** Desire to learn/try
* Willingness to fail
*** Willingness to ask questions
** Desire to work to best of ability
*** Responsiveness to time constraints
** Accuracy
* Willingness to get hands dirty
* Attention to detail
* Willingness to do clerical tasks
** Desire to follow-through
** Service orientation
Organizational identity
** Willingness to promote library and its services
* View of library as part of a larger information environment
* View of library as an organization
* Ability to see broad picture
* Ability to sacrifice short-term gains for long-term goals
* Political sense
** Curiosity
* Variety of interests
* Desire to grow personally
* Desire to grow professionally
*** Desire to remain current in specific and general subject field
*** Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING
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- ** Desire to remain current in specific and general subject field
- * Positive attitude toward job

SCHOOL LIBRARIAN COMPETENCIES

SERIALS CONTROL

ACTIVITIES

SERIALS CONTROL ENTRY LEVEL

Verification and Ordering

1. Receive citations for selected serials/numbered series from the acquisitions section
2. Receive citations from faculty and media center staff for subscriptions for the professional collection
3. Receive issues/parts of serials/numbered series from the acquisitions section which were received on approval, as gifts, etc.
4. Develop a working knowledge of the media center system's collection development policies and guidelines
5. Refer questionable citations/items to supervisor for selection review
6. Determine source of procurement for each title ordered (jobber, direct, gift, exchange, etc.)
7. Supervise ordering of serials/numbered series:
   - verify and locate additional bibliographic data as required; refer problems to supervisor
   - search serials records to determine if title is already on order
   - for older materials/citations, search catalog(s) to determine if entire series is in the collections already
   - prepare serials records for titles to be ordered
   - prepare subscription orders, including the proper "ship to" addresses for branch copies, if appropriate
   - prepare purchase orders, if required
   - prepare order documentation for mailing
   - forward order documentation to the acquisitions section for fiscal control and mailing
   - claim outstanding orders (no issues received)
   - claim missing issues
   - cancel orders, as required
   - re-issue orders to different sources as required
   - order replacement copies of damaged/lost issues
   - process renewals
   - maintain a statistical record of ordering operations
8. Search for trade and non-trade bibliographic information that technicians are unable to locate; refer problems to higher level staff, as appropriate

ACTIVITIES

SERIALS CONTROL ENTRY LEVEL

Receipt Processing

9. Supervise receipt processing of serials/numbered series:

   - sort incoming items, if appropriate
   - search serials file to locate the records
   - update records with receipt of individual issues/numbers/parts
   - flag records for gap filling
   - record/affix locator data on each piece (classification number, special collection symbol, etc.)
   - mark materials with the media center's identification
   - affix security labels
   - place issues in special binders, if appropriate
   - place new serial titles on the appropriate truck for delivery to the cataloging section
   - place items which have title changes on the truck for cataloging
   - place new issues for the reading room on the appropriate truck
   - place issues for the stacks on the appropriate trucks
   - place issues for branches on appropriate trucks if check-in is performed centrally
   - deliver trucks to proper locations
   - annotate receipt on packing slips/invoice copies, if received, and forward to the acquisitions section
   - annotate packing slips/invoice copies for damaged/imperfect or unwanted hardbound series; forward documentation and pieces to the acquisitions section for processing
   - place surplus materials in specified area to await proper disposal by the acquisitions section
   - maintain record of receipt processing statistics

10. Assign processing priorities to new serial titles and to other series requiring update of cataloging records

File Maintenance

11. Supervise creation and maintenance of serials records:

   - input records for copies ordered
   - update records with data re: cancellations, reissues, claims, and gap filling
   - update records with shelving location data for newly-cataloged titles
   - update records with data re: change in frequency, change of title, change in publisher, cessation, change of shelving location, etc.
   - input new records for newly changed titles

File Maintenance (cont'd)

11. Supervise creation and maintenance of serials records (cont'd):

    update records with binding control data if serials records are automated
    input cross reference records as required
    remove records from the active file when appropriate
    delete records when appropriate
    maintain statistical records of file creation and maintenance operations

12. Supervise the forwarding of correspondence re: cessation/completion of series to the cataloging section following maintenance of serials records

Other

13. Handle problems related to ordering and receipt processing of serials/numbered series and to overall maintenance of the serials records; refer problems to higher level staff, as appropriate.

14. Conduct business by phone, when appropriate

15. Write memos and letters, as required

16. Prepare manuals of procedures

17. Make recommendations to the section manager for improvement in operations of the unit/section

18. Attend and participate in staff meetings

19. Provide an overview of the operations of the unit/section to visitors, as requested

20. Supervise technicians, paraprofessional staff and volunteers

21. Work to develop "esprit de corps" among staff supervised

22. Assist section manager in writing job descriptions for self and for staff supervised

23. Assist section manager in developing performance standards for self and for staff supervised

ACTIVITIES

SERIALS CONTROL **ENTRY LEVEL**

Other (cont'd)

24. Assist manager in the review and performance evaluation of staff supervised

25. Assist in the selection of new technicians and paraprofessionals

26. Keep abreast of developments in the information field, library/media center practice, or legislation that affect library processing and control of serials/numbered series

27. Attend professional meetings and prepare reports for dissemination to staff

28. Develop professional contacts both within and outside the library/media center system

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SERIALS CONTROL **MID LEVEL**

Verification and Ordering

29. Develop procedures for the verification and ordering of serials/numbered series

30. Supervise the maintenance of an address file of procurement sources for serials

31. Draft form letters for ordering serials, claiming/cancelling orders, claiming missing issues, ordering lost/damaged issues, etc.

32. Work with the acquisitions section to schedule purchases of serials in order to operate within the budget

33. Work with the acquistions section to develop procedures for the handling of the final steps in serials ordering and invoice processing

34. Identify sources for filling gaps when the required issues are unavailable from the publishers

35. Coordinate gap filling as gaps are reported by collection maintenance staff as part of binding preparation and inventory operations

ACTIVITIES

SERIALS CONTROL MID LEVEL

Receipt Processing

36. Develop procedures for receipt processing of serials/numbered series

File Maintenance

37. Develop procedures for maintenance of the serials records

38. Make preliminary selection of forms and/or develop draft record formats for all serials record files

39. Work with collection maintenance staff to develop procedures and record formats for including binding control data in automated serials records

Fiscal Control

40. Together with the acquisitions section, work with the contract and/or purchasing department(s) of the school system to identify unique requirements and develop draft procedures for purchasing serials and services (e.g., open ended subscriptions, dealer check-in)

41. Work with the acquisitions section to develop procedures for proper packing slip/invoice handling and receipt certification by serial records staff

42. Assist acquisitions section in resolving any problems related to payment for serials

43. Remain aware of the expenditures and balances in the serials account(s); notify the section manager of situations which may require special action

44. Project budget requirements for purchasing serials for the new fiscal year

Other

45. Assess performance of existing equipment/systems used in serials records and investigate capabilities of other equipment/systems

46. Recommend acquisition of new/additional equipment/systems

47. Train staff in operation and in-house maintenance of equipment/systems

48. Supervise in-house operation and maintenance of equipment/systems

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SERIALS CONTROL MID LEVEL

Other (cont'd)

49. Gather information for maintenance contracts on equipment/systems

50. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance

51. Evaluate contractors' proposals

52. Train and supervise entry level staff

53. Assist in the selection of new professional staff

54. Write articles for professional journals/newsletters when appropriate

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SERIALS CONTROL SENIOR LEVEL

Selection

55. Review items identified by staff as being of questionable suitability for the collection; concur with the selections and/or refer the remaining questionable items to senior acquisitions staff for review

56. Work with senior acquisitions staff to formulate draft selection policies for serials/numbered series

57. Work with senior acquisitions staff to prepare draft selection guidelines for serials/numbered series to be used by selection staff as an aid in interpreting selection policies

58. Coordinate the annual review by reference and reader services staff and faculty advisory group(s) of the list of serials/numbered series currently acquired for the collection(s)

59. Coordinate the annual review by media center staff of the list of serial titles which they currently receive for the professional collection

Verification and Ordering

60. Select and maintain an up-to-date collection of aids to bibliographic verification of serials data

ACTIVITIES

SERIALS CONTROL SENIOR LEVEL

Receipt Processing

61. Work with senior acquisitions and cataloging staff members to identify processing priorities for various categories of serials and to draft guidelines for priority assignment

Other

62. Function as a technical expert in all matters related to processing of serials/numbered series

63. Interview dealers' representatives to learn about the particular services they offer

64. Identify dealers who have a good performance record in supplying irregular serials, conference/congress proceedings, and other series which are difficult to acquire on subscription

65. Assist the section manager in negotiating with dealers' representatives to obtain the required level of service in acquiring and/or processing serials

66. Evaluate dealers' performance and report to section manager

67. Work with interlibrary loan and cataloging section staff members to produce and/or update the media center system's serials holding list

68. Draft serial records procedures and policies; draft revisions as required

69. Flowchart and document serial records procedures

70. Assist section manager in on-going systems analysis of the section

71. Analyze serial processing statistics and prepare draft statistical reports

72. Train and supervise mid level staff

73. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

KNOWLEDGE

SERIALS CONTROL ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g., literature, music, etc.)
** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

* knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
** knowledge of available and emerging information technologies and their applications
* knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
* knowledge of how to learn on an ongoing basis

Knowledge about information work environments

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* knowledge of the variety of work settings and their organizational structures
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Knowledge of what work is done

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KNOWLEDGE

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** knowledge of the users' information needs and requirements
** knowledge of the collection, and of related collections

SERIALS CONTROL MID LEVEL

** greater depths of knowledge specified above
** knowledge of the operations of other sections in the library and how they relate to serials control
*** knowledge of available vendor-supplied systems, services and products to support serials control
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KNOWLEDGE

SERIALS CONTROL SENIOR LEVEL

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* arbitrate and negotiate

SERIALS CONTROL SENIOR LEVEL

Skills listed above are developed to a greater extent

Ability to:

** apply methods of measurement and evaluation
*** budget and make projections
*** optimize the use of library resources

COMPETENCIES VALIDATED AS BECOMING MORE VERSUS LESS IMPORTANT IN THE FUTURE

SERIALS CONTROL ENTRY LEVEL

Skills Related to Specific Activities

Ability to:

- ** perform each activity
- ** establish rapport with users and colleagues
- ** communicate well by written, verbal and non-verbal means
- ** conduct an interview
- ** conduct meetings with individuals and groups
- ** collect, analyze and interpret data
- ** make decisions and recommendations based on available information
- ** supervise staff
- ** work independently and in groups
- ** develop criteria for evaluation

Ability to:

- ** make effective, timely, and well-informed decisions
- ** isolate and define problems and develop the necessary criteria and action for their solution
- ** manage time effectively

SERIALS CONTROL MID LEVEL

Skills Related to Each Specific Activity

Ability to:

- *** perceive the needs of the organization and not just the library
- *** anticipate long-range needs of library
- *** design systems and procedures to improve library operations
- ** arbitrate and negotiate

SERIALS CONTROL SENIOR LEVEL

Ability to:

- *** apply methods of measurement and evaluation
- *** budget and make projections
- *** optimize the use of library resources

COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE

SERIALS CONTROL

Dispositional Attitudes

Attitudes Toward Institutions

* Respect for profession
* Respect for the library
* Respect for the parent organization

Attitudes Toward Other People

Toward Users

*** Respect users
* Like people in general
** Like children
*** Like to help people
* Like to meet people
* Like to make others feel comfortable
*** Sensitive to others' needs

Toward Others in the Workplace

** Respect co-workers
* Like to work with others/as a team
* Like to work on own
** Willingness to draw upon and share knowledge and experience with others
** Supportive of co-workers
* Enjoy managing/supervising others

Personal Qualities

* Alertness
*** Assertiveness
* Compassion/Kindness
* Confidence
*** Cheerfulness
* Dependability
* Determination/Tenacity
Diplomacy
Emotional stability
* Fairness
Flexibility/Versatility
Imagination
Inquisitiveness
* Leadership ability

ATTITUDES

SERIALS CONTROL

Personal Qualities (cont'd)

* Neatness
* Need for achievement
* Objectivity
Open-mindedness
* Optimism/Positive attitude
* Organization
* Patience
* Physical endurance
** Resourceful
* Sensitive/Thoughtful
* Sense of humor
* Sense of ethics
* Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

** Willingness to take/accept responsibility
* Willingness to take initiative
* Willingness to respond to authority, apply and follow policy
* Desire to learn/try
* Willingness to fail
* Willingness to ask questions
** Desire to work to best of ability
** Responsiveness to time constraints
** Accuracy
* Willingness to get hands dirty
* Attention to detail
* Willingness to do clerical tasks
** Desire to follow-through
* Service orientation
* Organizational identity
* Willingness to promote library and its services
* View of library as part of a larger information environment
* View of library as an organization
* Ability to see broad picture
* Ability to sacrifice short-term gains for long-term goals
* Political sense
Curiosity
* Variety of interests
* Desire to grow personally
Desire to grow professionally
* Desire to remain current in specific and general subject field
* Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

ATTITUDES

SERIALS CONTROL

Dispositional Attitudes

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SERIALS CONTROL

Attitudes Related to Job/Work/Organization (cont'd)

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* Attention to detail
* Willingness to do clerical tasks
* Desire to follow-through
** Service orientation
* Organizational identity
** Willingness to promote library and its services
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